Final Report

Aboriginal Tourism in Canada

Part II: Trends, Issues, Constraints and Opportunities

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Aboriginal Tourism Team Canada

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Executive Summary

Purpose

Canada's Aboriginal communities have become increasingly interested in the tourism industry in recent years. Cultural tourism has been identified by the World Tourism Organization as one of the hottest international tourism trends. This view is echoed by most in the travel industry worldwide. In Canada, it is recognized as having the potential to assist with many goals now being pursued by Aboriginal communities. Cultural leaders also recognize the benefits of Aboriginal tourism, ranging from contribution to a community's economic development to preservation and revitalization of cultural traditions.

In recognition of this growth and change, Aboriginal Tourism Team Canada (ATTC) in partnership with Aboriginal Business Canada (ABC), Indian and Northern Affairs Canada, Parks Canada and Canadian Heritage and the Canadian Tourism Commission determined to commission a national study of the Aboriginal tourism industry.

The key requirements of the national study were to determine the following:

- The profile of the industry and its economic impacts;
- Identification of tourism trends affecting the sector;
- Identification of issues and constraints facing the sector and individual businesses;
- Identification of opportunities for developing the industry; and,
- Implications of findings for industry capacity building and development.

To achieve these study requirements, two parallel study processes were carried out between February and December 2002. The first part of the study, denoted *"Aboriginal Tourism in Canada, Part I: Economic Impact Analysis,"* was carried out by Goss Gilroy Inc. It focused on the first of the above study requirements; namely, the development of an industry profile for Aboriginal tourism businesses in Canada and an assessment of the industry's economic impacts. The details and results of that study are given in a separate report.

The second part of the study, denoted *"Aboriginal Tourism in Canada, Part II: Trends, Issues, Constraints and Opportunities,"* focused on the four remaining study requirements noted above. This study was carried out by Bearing Point and Associates, and the details and results are reported herein.

The Research Process

The research process included a combination of secondary literature review and extensive interviews with several stakeholder groups either directly involved in or associated in some way with the Aboriginal tourism sector. The research activities are summarized in the table below.

Research Area	Research Method	Research Purpose
Both primary and secondary market research, and various reports and documents on the Aboriginal tourism sector.	Literature Review	Particular emphasis was given to identifying market potential and product opportunities for Aboriginal tourism. In addition, the research identified challenges and constraints facing the Aboriginal tourism sector.
Experiences and lessons learned in Aboriginal tourism.	Case Studies	The focus was on success stories and lessons learned in developing an Aboriginal tourism venture.
Regional Aboriginal Tourism Associations (RATAs).	Interviews with Questionnaire Guides	Interviews were conducted with representatives of all of the RATAs. Interviews focused on Aboriginal trends, issues and opportunities, and recommended strategies for the future.
Key informants including Aboriginal Tourism Team Canada, Parks Canada, Indian and Northern Affairs Canada, Canadian Tourism Commission.	Interviews with Questionnaire Guides	The interviews focused on the full range of trends, issues and constraints, opportunities and directions for strategies for growing the Aboriginal tourism sector.
Selected tour companies from Canada and North America, Europe and Japan.	Interviews with Questionnaire Guides	Broad-ranging interviews on the state of the Aboriginal tourism sector, constraints to product packaging, and suggestions for developing and strengthening the sector.
Representatives of agencies involved in financing and/or supporting Aboriginal tourism ventures in some way.	Capacity and Readiness Indicators Survey (interviews)	Focus on capacity and readiness issues together with suggestions for future directions in terms of an Aboriginal tourism strategy.
The economic impacts survey of business operators.	Business Operators Survey – Selected Interview Results	Focus on issues and challenges facing the Aboriginal tourism sector from the perspective of individual Aboriginal tourism operators.

The study team found a great deal of co-operation and interest from all stakeholder groups in the future of Aboriginal tourism. This co-operation helped to establish a robust set of quantitative and qualitative data which will be useful for future planning. The research results have identified several underlying themes for which there is a consensus among stakeholder groups and with the primary and secondary market research and literature. These are summarized below.

Research Findings

1. Market Trends

The market trend is moving towards greater interest in experiential products and experiences. This growing demand includes increasing interest in Aboriginal tourism products when related to ‘learning and enrichment’ experiences or included as a half or full day component of a multi-day touring itinerary as well as other forms of special interest tourism, such as ecotourism, adventure tourism and cultural tourism. Aboriginal tourism has great potential in all of these areas, whether as a stand-alone product or “layered” onto non-Aboriginal tourism product offerings. Clearly, this growing demand includes increasing international interest in Aboriginal tourism products. At the same time, domestic tourism markets are often forgotten in developing marketing strategies and must be included in the mix.

Target Travel Markets For Aboriginal Tourism. The most promising opportunities for Aboriginal tourism market development are tied to travellers in North America, select locations in Europe, and some countries in the Asia-Pacific region. Canadians represent opportunities to generate higher volumes of visitors linked to outdoors and heritage travel products (known as dual track visitors). Overall, the estimated number of potential dual track Aboriginal tourism visitors from these markets was placed at approximately 1.8 million Canadians and 1.9 million Americans in 1999. In a European context, the Italian, U.K. and German markets have been identified as having the strongest potentials for generating Aboriginal tourism travellers for Canada. In combination, they were forecasted to be able to generate 8.3 million visitors between 2000 and 2005. Although some Asian travel markets have expressed relatively strong interest in Aboriginal cultural tourism experiences, there is little other consumer information to substantiate the full potential of these markets at the present time.

Aboriginal Tourism Product Development Opportunities. In response to growing market interest, a wide range of tourism products and services are either being created or planned for development by Aboriginal communities and/or entrepreneurs in Canada. Seven product development groupings are identified in this report.

Accommodations	Aboriginal communities have a significant opportunity to develop accommodations that not only provide an essential tourism support service to travellers, but also can be enticing attractions for visitors. Through the use of appropriate and authentic designs, these accommodation facilities can enhance the overall quality of Aboriginal tourism experiences for tourists.
Food Services	Food and beverage services in Aboriginal tourism destinations are also being developed to enhance the quality of tourism experiences for guests.
Attractions	The rich history and culture of Aboriginal people in Canada provides opportunities for a variety of possible tourist attractions to be created.
Tour Packages	Professionally packaged and marketed tours offering a range of preplanned tourism activities (both Aboriginal and non-Aboriginal) are considered a prerequisite for competing in the international marketplace.
Festivals and Events	Events provide powerful incentives for tourists to visit unfamiliar or distant destinations. Both domestic and international travellers can be drawn to well-run and culturally unique festivals and events. Several existing and potential Aboriginal festivals and events have been recommended for inclusion in the marketing of Aboriginal tourism opportunities.
Mainstream Support Facilities	Because of the often remote and/or non-urban locations of many Aboriginal communities, a wide range of mainstream infrastructure is needed to support the creation of tourism opportunities. As a consequence, a range of supportive business facilities and services are required to accommodate future core tourism development options.
Park Partnerships	Aboriginal tourism development associated with initiatives in Canada's national protected areas and parks has received increasing attention in recent years. Several Aboriginal communities in and around federal, provincial and territorial protected areas have begun to explore the potential of creating tourism developments that capitalize on the assets of these areas. In some cases, Aboriginal communities and Parks Canada have established cooperative arrangements concerning the creation and delivery of a range of Aboriginal tourism experiences – many of which deal with interpretative and touring services.

2. Aboriginal Tourism Sector Issues and Constraints

While opportunities abound for the development of additional tourism product and market trends are clearly positive for this investment, there continue to exist major capacity issues in offering market-ready products. The industry is largely typified by small enterprises, many of which do not have sufficient tourism market awareness, business skills, product development and marketing expertise to successfully compete in the marketplace. This situation is an important issue for Aboriginal tourism product in gateway cities, but even more serious in remote and more rural areas. Other key and closely related constraints are a lack of market-ready product and access to financing. The most significant constraints are described below.

Information, education and training constraints. Many Aboriginal people in Canada lack the information, education, and training necessary to develop and manage successful and sustainable tourism businesses.

Marketing constraints. There are several recurring weaknesses associated with current levels of Aboriginal tourism marketing activity. In order to develop greater awareness of existing products that are suited to current and potential Aboriginal tourism markets, the following issues need to be addressed:

- Fragmented/weak marketing
- Lack of marketing skills and resources
- Limited understanding of market
- Limited awareness of products by market.

Image and attitude constraints. Aboriginal tourism in particular faces a number of issues related to image and attitude that have the potential to negatively affect the industry in Canada. They are as follows:

- *Negative labour force attitudes:* Tourism is often seen by Aboriginal communities as providing few good paying jobs, as well as offering few opportunities for career development.
- *Negative image of Aboriginal peoples:* Current political and social problems that are perceived to be associated with Aboriginal people in Canada have created market apprehensions about travelling to Aboriginal destinations.
- *Perceived negative quality and authenticity of products/facilities**:*** There is a concern amongst international tour operators over the level of quality and authenticity of some Aboriginal tour products being offered.
- *Concern over cultural integrity**:*** Some forms of tourism development can have negative effects on Aboriginal communities and their cultures.

Funding constraints. Aboriginal tourism entrepreneurs face two types of funding constraints. They are as follows:

- *Lack of available funding programs:* The limited funding that does exist for an Aboriginal entrepreneur is difficult to obtain and slow in being issued.
- *Limited awareness of potential funding sources:* Many Aboriginal communities and individuals are unaware of the potential funding sources available to them.

3. Aboriginal Tourism Industry Support Programs

The Regional Aboriginal Tourism Associations (RATAs) have been created to work with Aboriginal tourism entrepreneurs and communities to develop and market Aboriginal tourism product. For the most part, the RATAs lack sufficient capacity to be effective. While discernible and positive progress has been made in Ontario and Quebec, for the most part the RATAs have not been able to deliver on the intended objective of strengthening and growing the Aboriginal tourism sector. This lack of capacity means that RATAs cannot effectively address issues constraining growth, which are typically summarized as a lack of awareness within Aboriginal communities of the social, cultural and economic benefits of tourism, as well as an absence of marketing resources, product that is not market ready, difficult and challenging access to financing and lack of business skills. In all of these areas, institutional capacity must be strengthened to assist existing and potential Aboriginal tourism entrepreneurs to develop competitive product.

4. Aboriginal/Non-Aboriginal Tourism Partnerships

There is a general and pervasive attitude that Aboriginal tourism product must partner with other Aboriginal tourism products and not with the non-Aboriginal travel trade. This attitude must be overcome if Aboriginal tourism product is to thrive in the marketplace. There are many reasons for this attitude, including a lack of understanding between the two stakeholder groups, distrust concerning product delivery, and the like. Notwithstanding these issues, any successful Aboriginal tourism growth strategy will need to successfully challenge and overcome this perception.

5. Aboriginal Tourism Strategies

In considering strategies to facilitate or foster growth, the core issue is the tourism product in question, together with focused marketing that matches market expectations to that product.

Without market-ready product, all else fails in a tourism growth strategy. In general, there is a lack of market-ready product in the Aboriginal tourism sector, and particularly for products and services located in or near gateway cities and near major tourism routes. There are notable exceptions, but for the most part the product simply does not meet domestic and/or international market expectations in areas such as duration, authenticity, quality and price. Therefore, any strategy must emphasize product development and upgrading as a cornerstone. This is not to say that market issues are any less a priority. Investment in successful product also means that the market channels and linkages must be put in place at the same time in order to ensure that the product, once offered, will be a success. Too often, one encounters programs focused on training/product development in tourism without any attention to the market. All of the good work and progress that is made in the product area will come to naught if parallel attention has not been paid to ensuring that it gets to market successfully, and at prices that ensure viability.

Conclusions

The research results point to a positive future for Aboriginal tourism in spite of the many issues and constraints identified by various stakeholder groups. There is clear consensus among all stakeholders that growth potential is significant and can be attained with programs to address the issues and constraints. Given this level of market potential demonstrated through the research, there is no reason not to pursue a more aggressive approach to growing the Aboriginal tourism sector.

It is also clear that a national vision and approach is necessary to foster growth in the Aboriginal tourism sector. Markets, both international and national, are key to this process. The travel trade businesses serving these markets have a national perspective and are seeking to package "Aboriginal product in Canada," whether for their domestic clientele or for international clientele. Therefore some consistency in distribution channels, marketing approaches, and product standards will be required to enhance the positioning of Aboriginal tourism product for both domestic and international markets.

The travel trade has also observed that more product is required for mainstream markets. This implies ready access in urban areas which receive the majority of tourism activity on an annual basis in Canada. This offers an important strategy for growing the sector and provides a venue for increasing interest in Aboriginal tourism product and introducing product in more remote areas.

Finally, a national initiative and perspective will help to facilitate partnerships for the sector. This can be supported at a national level through programs ranging from web site information to co-ordination and organization for trade show participation by Aboriginal tourism operations and entities from regions and local communities.
With that perspective in mind, it is clear that activity at all levels (from local to national) is important to advance the development of the Aboriginal tourism sector.

Introduction

Canada's Aboriginal communities have become increasingly interested in the tourism industry in recent years. Cultural tourism is currently one of the hottest international tourism trends, and is recognized as having the potential to assist with many goals being pursued by Aboriginal communities. For example, First Nations government and economic development officials are interested in tourism's economic development potential. Cultural leaders recognize that it has the potential to assist with the preservation and revitalization of cultural traditions. Resource managers view it as an option that preserves the environment while providing sustainable development. For these reasons and many others, the Aboriginal tourism sector has experienced significant growth and change, especially over the last decade.

In recognition of this growth and change, Aboriginal Tourism Team Canada, in partnership with Aboriginal Business Canada, Indian and Northern Affairs Canada, Parks Canada, Canadian Heritage and the Canadian Tourism Commission in early 2002 determined to commission a national study of the Aboriginal tourism industry.

The key requirements of the national study were to determine the following:
- The profile of the industry and its economic impacts;
- Identification of tourism trends affecting the sector;
- Identification of issues and constraints facing the sector and individual businesses;
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The second part of the study, denoted "*Aboriginal Tourism in Canada, Part II: Trends, Issues, Constraints and Opportunities,*" focused on the four remaining study requirements noted above. This study was carried out by Bearing Point (formerly KPMG Consulting LP) and its associates, O'Neil Marketing and Consulting and Dr. Peter Williams. The details and results of this study process are presented herein.

1.1 Study Process and Organization of Report

The study process was designed to source multiple lines of evidence on the Aboriginal tourism sector and the four study requirements pertaining to this phase of the study, as outlined above. This report integrates and describes the research findings from all of these sources, as follows:

- **Section 2: Literature Review –** provides a comprehensive review of relevant existing and current Aboriginal tourism related reports and documents. Summarizes the key points found in the literature including geographic travel markets for Aboriginal tourism in Canada, the nature of existing tourism products and services, the specific forms of tourism recommended for the marketplace, and the challenges facing tourism operators in responding to the marketplace.
- **Section 3: Regional Aboriginal Tourism Associations Input –** provides a summary of interviews held with representatives of the Regional Aboriginal Tourism Associations (RATAs). The focus of these interviews was to profile the RATAs, and to gather the perspectives of the RATAs' leadership on the development of the Aboriginal tourism industry as well as their recommendations for future expansion of the industry.
- **Section 4: Key Informant Input –** provides results of interviews with key informants from Aboriginal Tourism Team Canada (ATTC), the Canadian Tourism Commission (CTC), Parks Canada and the former Canadian National Aboriginal Tourism Association, the predecessor to ATTC. The interviews focused on obtaining insight into emerging trends, issues constraining the industry, product and market development opportunities, and strategies required to deal with the issues and take advantage of the trends and opportunities.
- **Section 5: Capacity and Readiness Indicators Survey –** presents results of surveys carried out with Aboriginal Business Canada (ABC), Indian and Northern Affairs Canada (INAC) and regional economic development representatives experienced in the Aboriginal tourism sector. The focus of the surveys was to gain insight into which capacity and readiness indicators are important to Aboriginal tourism development and to what extent these indicators are present in Aboriginal communities. In addition, the survey gathered recommendations on the strategies that ATTC and the RATAs can take to help develop the key indicators.
- **Section 6: Tour Company Input –** presents results of a survey of representatives of Canadian and international tour companies which offer Aboriginal tourism products. The goal of the survey was to gain an industry perspective on emerging trends, market characteristics, product and market development opportunities, and issues and constraints facing the industry.
- **Section 7: Case Studies – Key Findings** – summarizes the results of case studies of three Aboriginal tourism ventures and one RATA. The focus of the case studies was on identifying lessons learned and Aboriginal tourism business success criteria.
- **Section 8**: **Business Operator Survey** – presents the findings of a survey of Aboriginal tourism business owners/managers. The intent of survey was to collect information on the issues and factors impacting the performance of Aboriginal businesses, and on the types of training and other assistance needed to improve performance.
- **Section 9**: **Summary of Research Findings–** summarizes the results of all of the research components with respect to trends, issues and constraints, development opportunities and strategies for future industry development.

In addition, supporting research documentation and a list of consultation contacts are presented in the appendices.

2. Literature Review

The study process included a review of the relevant existing and current Aboriginal tourism-related reports and documents. Based on this review, this section provides insights into the character of key travel markets important to the development of Aboriginal tourism in Canada, and the nature of Aboriginal tourism products and services which are attempting to respond to these demands. First a market component discussion is provided. It places particular emphasis on summarizing overriding perspectives concerning the affinity of specific geographic travel markets for Aboriginal tourism in Canada. Next, the discussion focuses on identifying specific forms of Aboriginal tourism development being recommended for the marketplace. Finally, special attention is focused on identifying the overriding challenges confronting Aboriginal tourism operators in responding to the needs of the travel marketplace.

2.1 Market Characteristics

According to Aboriginal Tourism Canada, the Price Waterhouse Coopers research and study has provided important information and data for the Aboriginal tourism industry and as such, the following sections directly quote the aforementioned study.

2.1.1. Canadian Market Profile

In keeping with broader travel trends in Canada, the primary markets for Aboriginal tourism are domestic and American travellers. Overall, “Canadians account for approximately 70% of total Canadian tourism revenues and 80% of total visitation.”(PWC Consulting, p. 8). Estimates suggest that “on average, Canadian residents take about 4.0 intra-provincial pleasure trips and 1.7 inter-provincial pleasure trips every two years (TAMS 2000).” (PWC Consulting, p.8). From an Aboriginal tourism perspective, characteristics of these travellers that are especially relevant include their:

- growing interest in natural, authentic, and proximate travel experiences; (PWC Consulting, p.8)
- search for value-conscious opportunities (especially with depreciated currency); (PWC Consulting, p.8)
- preference for independent travel and late pre-trip planning and booking; (PWC Consulting, p.8)
- search for “meaningful” life discoveries (especially for more mature baby-boomers); (PWC Consulting, p. 8).
- interest in packaged mid and long-haul travel (especially amongst non-family markets such as singles, couples and empty-nesters); (PWC Consulting, p. 9).
- perceptions of Canada as having much to offer in terms of culture, entertainment and opportunities to experience nature and participate in outdoor activities; (PWC Consulting, p. 9).
- broad interest and intent (about 70% of adults) in seeking some elements of outdoor and/or cultural tourism experiences capable of being supplied by Canada’s Aboriginal communities; and
- specific interest in “soft adventure” such as wildlife viewing, horseback riding, cross-country skiing (65%); “hard adventure” such as kayaking or canoeing, wilderness hiking/backpacking (49%); “cultural / learning” activities with a specific focus on Aboriginal cultural experiences (6%), fishing (22%) and hunting (5%) **(Table 1, Appendix 1)**.

Dual Track Aboriginal Tourism Market Segment

Market analysis of TAMS 2000 data suggests that a “Dual Track” niche market interested in Aboriginal tourism experiences exists in North America. This market segment is comprised of those who have participated in relatively recent overnight trips (past two years) and have taken part in at least one of the following activities: “Aboriginal cultural experiences” in remote or rural settings; “Pow Wows or other Aboriginal celebrations,” or visits to “Aboriginal attractions” **(Table 2, Appendix 1)**. This market niche is not only apparent in Canada, but also in the United States. Because many Aboriginal groups in Canada offer tourism products that combine outdoor and cultural experiences, this “Dual Track” segment has been highlighted as a market niche of particular importance for future development.

Compared to other Canadian and American travellers this market is much more interested in seeing natural wonders, historical sites and important places in history, unspoiled nature, pursuing adventuresome and exciting activities, and experiencing different cultures and ways of life **(Table 3, Appendix 1)**.

Like their American counterparts, Canadians in the Dual Track niche segment are more apt to have experienced Aboriginal attractions (66%) and Aboriginal cultural experiences in remote settings (45%) than to have gone to an Aboriginal celebration (30%). Limited awareness of Canadian Aboriginal destinations for such travels exists amongst Dual Track markets **(Table 3, Appendix 1)**.

Cultural Activities

Dual Track travellers are more active when they travel than their general travel counterparts. They are not only much more likely to have been to Aboriginal cultural events and activities, but they are at least twice as likely to have engaged in other cultural activities such as going to museums, art galleries, concerts, etc.).

Outdoor Activities

Dual Trackers are also very interested in “soft” outdoor activities. They are at least twice as inclined as the general travelling public to want to see wildlife, birds, and wildflowers/ flora. Other popular active outdoor activities among the Dual Track market that may create interesting packaging opportunities for Aboriginal product include hard adventure pursuits such as hiking/backpacking in wilderness settings (53%), fresh-water fishing (37%), canoeing and kayaking (27%) and whale watching for those regions of Canada with whales to watch (31%).

Table 4, Appendix 1 highlights outdoor activities in which the Dual Trackers exceed preference levels for outdoor activities expressed by more general travellers. These activities, when packaged with Aboriginal cultural experiences, represent a potentially attractive mix of cultural and outdoor attributes for Canadian travellers. In addition to their pursuit of outdoor activities, Dual Trackers display an interest in “accommodation-based” outdoor experiences. About 40% of them have visited a lakeside resort and another third of these travellers have stayed at camps in wilderness settings.

Other Activities

Interest in casinos and gambling while travelling is characteristic of about one-quarter of potential Dual Track Canadians. Considerably more of these tourists shop at local arts and crafts outlets (71%) and antique markets while on their trips (49%). These activities might be combined with the outdoor and cultural interests when packaging Aboriginal product for Dual Track visitors **(Table 5, Appendix 1)**.

Demographic Characteristics

Canadians in the Dual Track market are almost identical to the general travelling public in Canada with respect to the gender, age and income distributions. However, Canadians in this group tend to be less concentrated at the upper end of the income spectrum (12%) than are their American counterparts (22%) **(Table 6, Appendix 1)**. They also tend to live in households with no children (71%). This may help to explain their propensity to take getaways or vacations on their own (34%) or with a partner/spouse but no children (63%) **(Table 7, Appendix 1)**.

Anglers and Hunter Markets

Because of their traditional and ongoing prominence as a part of Aboriginal tourism in Canada's provinces and territories, a discussion of the hunting and angling travel markets is provided.

Of the 4.4 million Canadians in this group, 3.9 million claim to fish but less than one million indicate that they hunt. Almost all of the hunters are also anglers (86%) but only one-fifth of anglers also claim to have hunted on a recent trip (21%). While expressing enthusiasm for fresh-water fishing opportunities (81%), these travellers also seek outdoor travel experiences that enable them to see wildlife (47%). Many of them are hikers (40%) or boaters (40%) and over one-third golf while on pleasure trips (37%). Approximately one-seventh are big game hunters - the same proportion that have recently been horseback riding and/or snowmobiling on a recent pleasure trip. **(Table 8, Appendix 1)**.

In addition to their interest in outdoor activities, members of this market segment enjoy "accommodation-based" outdoor experiences. They are at least twice as inclined as the general travelling public to go to lakeside resorts, to camp in wilderness settings and to rely on outposts and lodges. They also represent an important market for drive-in wilderness lodges, preferring these (17%) to remote lodges that are not accessible by car (fly-in lodge, 7%; fly-in outpost, 1%) **(Table 9, Appendix 1)**. Amongst anglers and hunters, Canada's image as being a place with *beautiful scenery* (9.1) is well-developed among Canadians, and so too is its image as a *great place for fishing* (8.7) *and hunting* (8.4) **(Table 10, Appendix 1)**.

2.1.2. United States Market Profile

"The U.S. is Canada's largest international tourism market, accounting for 15.2 million trips of one night or more in 2000. However, Europe has now surpassed Canada as the most popular destination for U.S. outbound leisure travellers. American attitudes towards travel have clearly been affected by "September 11th" and other recent terrorist events. While their willingness to travel has certainly been curtailed over the past year, their interest in safe travel has not faltered."(PWC Consulting, p.10). Characteristics of travellers in this market which are of relevance to Aboriginal tourism development include their:

- interest in visiting natural wonders, historical sites, as well as experiencing adventure and excitement and different cultures; (PWC Consulting, p. 10).
- interest in visiting casinos for gambling purposes; (PWC Consulting, p. 10).
- high participation in most types of cultural and entertainment travel related activities; (PWC Consulting, p. 10).
- increased focus on safety factors (both personal and environmental), airport security and destination cleanliness; (PWC Consulting, p. 10).
- extremely favourable monetary exchange rates which enable them to take advantage of high value Canadian destination travel packages; (PWC Consulting, p. 10).
- interest in shorter haul, motor coach and non-air travel packages (particularly post-"September 11th"); (PWC Consulting, p. 10).
- growing use of the Internet as a preferred medium for researching and booking travel; (PWC Consulting, p.10)
- growing use of adventure and educational packages; (PWC Consulting, p.11).
- interest in natural and authentic destinations (especially amongst mature and middle-aged travellers); (PWC Consulting, p.11).
- high ratings of Canada in terms of safety and security, cleanliness, friendliness and political stability (of increasing importance since September 11th); (PWC Consulting, p.11).
- perceptions of Canada as a place offering abundant opportunities to experience nature and participate in outdoor activities; (PWC Consulting, p.11) and
- limited awareness of Canada as a destination to see and experience Aboriginal culture.

Aboriginal Tourist Market

American travellers interested in Aboriginal tourism experiences have many traits in common with their Canadian counterparts. However, a greater proportion of them (10%) have participated in an Aboriginal-related vacation activity in recent years (TAMS 2000**).** In this context, "they are more likely to have visited Aboriginal attractions than to have encountered Aboriginal experiences in a remote setting. Participation levels are highest among mature/senior and well-educated travellers, as well as among those who took a trip to Canada from the U.S. in the past two years." (PWC Consulting, p.11) **(Table 11, Appendix 1)**.

Like their Canadian counterparts, "American Aboriginal culture travellers are also likely to participate in other cultural activities when they travel (i.e., take in art galleries, attend cultural performances, visit carnivals and local fairs). In addition, they are quite likely to pursue "soft" outdoor adventure activities (i.e., view natural wonders and wildlife, go hiking/backpacking in wilderness settings, and visit lakes for fishing, canoeing and kayaking)." (PWC Consulting, p. 11).

"Because of their strong secondary interest in nature and the outdoors, these travellers can also be attracted to water-oriented resorts, camping areas, and mountain and wilderness lodges. Casino gambling and shopping for local arts and crafts are common interests among these Aboriginal culture travellers. Typically these travellers are likely to have consulted with a large number of information sources (e.g., articles in newspapers / magazines, travel information offices and travel guides) in planning their vacations. They look for destinations that offer a combined natural, cultural and learning-related experience for their trips, all of which Canada has in abundance." (PWC Consulting, p. 12).

2.1.3. European Market Profiles

Existing information suggests that several European markets have strong propensities to participate in Aboriginal tourism experiences during their long-haul vacations. The following section summarises the overriding characteristics of those travel markets which have the greatest affinity for Aboriginal culture tourism products. For each of these markets a description is provided of each geographic travel segment's: general travel behaviour, affinity for Canada, potential for Aboriginal tourism, and interest in other cultural products. The markets profiled are those for which relevant market data exists. They include the United Kingdom, Germany, Switzerland, the Netherlands, France and Italy.

United Kingdom Market Profile

"A combination of a relatively strong currency, liberal vacation time allotments and a strong commitment to the benefits of travel, play important roles in driving increased levels of outbound long-haul pleasure travel by UK travellers. These tourists have a strong awareness of many international travel destinations, as well as the confidence and knowledge to travel to them independently."(PWC Consulting, p. 13). U.K. travellers express "high levels of interest in exploring and learning about different cultures. They enjoy experiencing local products and services (e.g., local crafts and foods) and the indigenous ethnic cultures of destinations." (PWC Consulting, p. 15). "The U.K. is Canada's most important overseas market in terms of both the volume of travellers and the overall receipts they generate." (PWC Consulting, p. 14).

From an Aboriginal tourism development perspective, key traits of this market include their:

- “tendency to take lengthy long-haul trips (e.g., over three weeks) in small travel parties;
- propensity for active travel schedules which revolve around beaches, small towns, local culture and historical places;
- search for new places characterized by cleanliness, safety, nice weather, opportunities to increase knowledge, reasonable prices and value for money;
- heavy reliance on travel agents, friends and family for trip planning information; and
- limited use of tour packages.” (PWC Consulting, p.14).

While comprehensive quantitative information concerning the characteristics of U.K. travellers is somewhat dated (1996), available data suggests a relatively strong interest in pursuing Aboriginal tourism opportunities. “According to the 1996 U.K. PTMS Study, approximately 52% of U.K. long-haul pleasure travellers rated Aboriginal culture as a somewhat or very important motivating factor in their selection of travel destinations. At the time of that study, the incidence of participation in Aboriginal culture experiences while on their most recent trip was estimated to be about 30%.” (PWC Consulting, p.14).

“Aboriginal culture travellers from this market place high importance on having a variety of things to see and do while travelling. In addition to their Aboriginal activities, these travellers pursued a range of sightseeing pursuits, including visits to small towns and villages, scenic landmarks, national parks and forests and urban centres. They tended to be middle-aged, well-educated, and male travellers.” (PWC Consulting, p.14). Demographic characteristics of U.K. Aboriginal culture travellers are summarized in **Table 12, Appendix 1**.

German Market Profile

Germany has historically been an important high yield travel generating market for Canada. “In more recent times, this position has been somewhat weakened due to tougher economic conditions in that country. As a result, a smaller segment of older, better educated and more affluent travellers who are also increasingly more cost conscious in planning their trips currently characterise this long-haul pleasure travel market.” (PWC Consulting, pp. 15-16). Traits of this market which may be of particular importance to Aboriginal tourism development in Canada include their:

- growing propensity for taking shorter trips, participating in fewer vacation activities and generating lower per person trip expenditures than five years ago; (PWC Consulting, p.15).
- preference for clean, high environmental quality, scenic, good weather and safe destinations that provide opportunities to see and learn new things, relax and escape at a reasonable price; (PWC Consulting, pp. 15-16)
- preference for destinations where they can experience good service and friendly local people, relaxation and escapism; (PWC Consulting, p.16).

- longer time trip planning and booking horizons, aimed at taking advantage of early booking discounts; (PWC Consulting, p.16).
- predominant use of travel guides and books for trip planning, and travel agencies for trip bookings; and (PWC Consulting, p.16).
- frequent use of travel packages on long-haul trips. (PWC Consulting, p.16).

"According to the 2001 Germany Consumer Research Study, approximately 20% of German long-haul pleasure travellers participated in Aboriginal culture activities on their most recent trip, while 44% rated it as an important motivating factor for destination selection. These German travellers have a strong secondary interest in nature and history and can also be attracted by opportunities to visit national parks, or areas of historical and / or archaeological interest. German Aboriginal culture travellers tend to be middle-aged, well educated, and male." (PWC Consulting, p.16) **(Table 13, Appendix 1)**.

Swiss Market Profile

"The Swiss enjoy a higher than average European standard of living and place a high priority on leisure travel." (PWC Consulting, p.17). Key characteristics of this market that are important from an Aboriginal tourism development perspective include their:

- "high levels of independence when travelling;
- preference for touring-oriented holidays among French-speaking Swiss;
- preference for more outdoors-oriented holidays among German-speaking Swiss;
- concern for getting good value for money; and
- reliance on the travel trade in selecting and booking destinations." (PWC Consulting, p.17).

"According to the 2000 Demand for Aboriginal Culture Products Study, Aboriginal culture was rated as important in selecting a destination by 57% of Swiss long-haul pleasure travellers. Approximately 45% of them participated in some Aboriginal culture activities on their most recent trip." (PWC Consulting, p.17). "In the minds of Swiss travellers, Canada is more about nature than culture, action and adventure rather than relaxation, and wildlife rather than cities. Consistent with the Swiss traveller in general, Swiss Aboriginal culture travellers tend to be young and high-income earners." (PWC Consulting, pp.17-18) **(Table 14, Appendix 1)** .

Dutch Market Profile

"Buoyed by a relatively strong economy, the Dutch market is considered to have a high propensity for overseas travel. They tend to be mature, energetic, affluent, and independent travellers." (PWC Consulting, p.18). Key market characteristics of the Dutch which may be important from an Aboriginal tourism development perspective include their:

- search for high-quality destinations offering safety, tranquillity, attractive scenery, landscape and opportunities for personal well-being; (PWC Consulting, p.18).
- growing interest in special interest holidays offering opportunities to experience different cultures or getting in touch with nature (e.g., safaris, mountain climbing); (PWC Consulting, p.18).

- emphasis on price-sensitivity when making travel decisions; (PWC Consulting, p.19).
- preference for English-speaking destinations; (PWC Consulting, p.19) and
- growing preference for e-commerce transactions. (PWC Consulting, p.19).

“According to the 2000 Demand for Aboriginal Culture Products Study, the incidence of participation in Aboriginal culture activities on their most recent trip was estimated to be about 35% among Dutch long-haul pleasure travellers. About 40% of them rated this product as an important motivating factor in their selection of travel destinations. Dutch Aboriginal culture travellers were most likely to be baby boomers or maturing adults from high-income households.” (PWC Consulting, p.19). **(Table 15, Appendix 1)**.

French Market Profile

“France represents Canada’s third largest market within Europe.” (PWC Consulting, p.20). “Despite recent decreases in outbound travel due to a worsening economic climate at home, French tourists continue to travel abroad. These travellers tend to be middle-aged, married and very well educated.” (PWC Consulting, p.19). Some of the key market characteristics which may be important for Aboriginal tourism development include their:

- “propensity to take their vacations during the peak travel seasons (July, August and December) rather than spread throughout the year;
- strong focus on travel experiences associated with local and ethnic culture, (e.g. foods, crafts and people) in safe and tranquil environments;
- preference for fairly budget conscious and price conscious travel options;
- heavy use of travel agents in planning their trips, with growing levels of Internet trip bookings; and
- frequent incidence of use (50+%) of trip packages on visits to Canada.” (PWC Consulting, p.20).

While relatively dated, “information from the 1998 France Strategic Segmentation Study estimates that about 16% of French long-haul pleasure travellers participated in Aboriginal culture activities on their most recent trip, while 62% rated it as an important motivating factor for destination selection. French Aboriginal culture travellers are motivated by opportunities to try local foods, see local crafts, meet different ethnic groups, and of course, meet unique indigenous peoples. This group has a strong secondary interest in nature and sports and is attracted to natural ecological sites, wilderness adventures, snowmobiling, other winter sports and spectator sporting events. They are likely to pursue sightseeing opportunities in combination with culture-related activities such as visits to small towns and villages, urban centres, and scenic landmarks. French Aboriginal culture travellers tend to be older single males.” (PWC Consulting, p.20). **(Table 16, Appendix 1)**.

Italian Market Profile

"Italians have not traditionally been major long-haul visitors. Potential travellers to Canada are young singles and middle-aged travellers, who are well educated, and gainfully employed. They also tend to be experienced long-haul travellers." (PWC Consulting, p.21). Italian market characteristics which might be important for Aboriginal tourism development include their:

- interest in touring holidays that involve exploring the cultural heritage of specific regions; (PWC Consulting, p.21).
- rising interest in culture and nature products (especially among middle-aged travellers); (PWC Consulting, p.21).
- tendency to search for the best deal, and not being prepared to compromise on comfort, quality or value; (PWC Consulting, p.22) and
- late purchases of long-haul trips through travel agents. (PWC Consulting, p.22).

"According to the 2000 Demand for Aboriginal Culture Products Study, approximately 53% of Italian long-haul travellers participated in Aboriginal culture activities on their most recent trip, while 71% rated it as an important motivating factor for destination selection. Italian Aboriginal culture travellers are demographically similar to the Italian long-haul market as a whole." (PWC Consulting, p.22). **(Table 17, Appendix 1)**.

2.1.4 Asia-Pacific Market Profiles

Comprehensive and current data concerning the Aboriginal travel interests of long-haul travellers from the Asia-Pacific region are limited. However, those data that do exist clearly suggest that markets are emerging for such forms of travel experiences. This section profiles the emerging markets of Japan, Taiwan, Australia, and Hong Kong.

Japan Market Profile

"The ongoing challenges of an unhealthy Japanese economy continue to dampen outbound travel by Japanese travellers. In spite of this slowdown, Japan is still Canada's most important tourism market in the Asia/Pacific region. Those who are currently travelling abroad are more sophisticated in their travel habits than in the past, and are starting to plan and make their own destination decisions. They tend to be older, better educated females with higher than average household incomes." (PWC Consulting, p.23). Some key characteristics of this market which may be important for Aboriginal tourism development include their:

- "preference for safe and secure destinations with good travel infrastructure, cultural and heritage products, shopping and flexible escorted tour options;
- growing interest in opportunities to be close to nature;
- growing price sensitivity, with considerably less expenditures while on trips;
- dominant use of brochures/pamphlets and travel agencies as trip planning sources; and
- preference for prepackaged, but flexible customized tours." (PWC Consulting, p.23).

"According to the 1995 Japan PTMS Study, approximately 12% of Japanese long-haul pleasure travellers rate Aboriginal culture as an important motivating factor for destination selection. This group has a strong secondary interest in the outdoors and are attracted by opportunities to pursue visits to natural ecological sites, outdoor activities, and the rural countryside. Aboriginal culture travellers are also apt to take part in other local, cultural and nature-related activities on their trips. They are more likely to be young singles, compared to the Japanese long-haul population as a whole." (PWC Consulting, p.24). **(Table 18, Appendix 1)**.

Taiwan Market Profile

"A stronger but uncertain Taiwan economy and fragile political context suggests reasonable but unstable growth potential for long-haul travel. Taiwan ranks behind only Japan as a source of Asian visitors to Canada. For Taiwanese travellers, Canada is known for its unique nature and scenery, its cleanliness and environmental quality, and its exotic atmosphere. While Taiwan's outbound travel was initially limited to older and more affluent residents, the market is now getting younger. More recent Taiwanese travellers to Canada are younger singles, with more education and higher incomes." (PWC Consulting, pp.24-25). Key travel market characteristics which may be important for Aboriginal tourism development include their:

- "focus on trips with fewer destinations and more time to fully explore each one;
- growing interest in accessible outdoor activities and world-heritage sites;
- search for opportunities to increase their knowledge of new and different places;
- search for clean and healthy environments and destinations; and
- growing preference for independently organized trips (particularly amongst younger travellers)." (PWC Consulting, p.25).

"According to the 1994 Taiwan PTMS Study, approximately 49% rated Aboriginal culture as an important or very important motivating factor for destination selection. Taiwanese Aboriginal culture travellers tend to be relatively young, well-educated females." (PWC Consulting, p.25). **(Table 19, Appendix 1)**.

Australian Market Profile

"Canada is growing as a scenic, safe, clean, top-of-mind destination for Australians. Traditionally, Australian pleasure travellers to Canada have been middle-aged or older, often retired, and travelling as part of a couple, frequently for visiting friends and relatives (VFR) purposes. They have pursued nature and outdoors experiences on their Canadian trips. Australians have a desire for travel and tend to take long trips, incorporating many different activities." (PWC Consulting, p.26). Characteristics of this market which may be importance from an Aboriginal tourism development perspective include their:

- "growing demand for special interest holidays such as history/culture, educational and adventure trips;
- strong interest in seeing the world, meeting new people, and learning new things;
- preference for cleanliness, personal safety, nice scenery and good value for money when selecting destinations;
- search for value-for-money when choosing holiday destinations;
- emphasis on greater independence and flexibility in travel (e.g. FIT and self-drive vacations); and
- prominent use of travel agents are a key source of trip planning information." (PWC Consulting, p.26).

"According to the 1995 Australian PTMS Study, approximately 21% of Australian long-haul travellers participated in Aboriginal culture activities on their most recent trip. These Aboriginal culture travellers are seeking destinations which offer different cultural experiences such as local festivals or exposure to unique ethnic groups such as Aboriginal communities. They are interested in trips which combine cultural and heritage experiences. This segment is predominantly female, and is somewhat older than the typical Australian long-haul traveller." (PWC Consulting, p.26).

Hong Kong Market Profile

"Hong Kong's affluent population and low personal tax rates drive its outbound long-haul travel market demand. Long-haul pleasure travellers from Hong Kong are typically well educated, hold good jobs and have strong buying power." (PWC Consulting, p.27). Some key characteristics of this market from an Aboriginal tourism development perspective include their:

- "strong interest in touring trips to multiple destinations, that allow them to see and do as much as possible;
- relatively autonomous style of trip decision making, coupled with the frequent use of travel agencies when it comes to actually booking their trips;
- short time horizons when booking trips; and
- frequent use of all-inclusive packages and guided tours." (PWC Consulting, p.27).

"According to the 2001 Hong Kong Consumer Research Study, approximately 82% of Hong Kong long-haul pleasure travellers rate Aboriginal culture as an important or very important motivating factor for destination selection (with 22% indicating it was very important). Aboriginal culture travellers from Hong Kong tend to be older married travellers." (PWC Consulting, p.28). **(Table 20, Appendix 1)**.

2.1.5 Markets Summary

Market Size

Based on these assessments the best opportunities are linked to promoting Aboriginal tourism to North American and select markets in Europe. In a North American context the top opportunities are associated with Dual Trackers in Canada and the United States. Canadians represent opportunities to generate higher volumes of visitors linked to outdoor and heritage travel products. Overall, the estimated number of potential dual track Aboriginal tourism visitors from these markets was placed at approximately 1.8 million Canadians and 1.9 million Americans in 1999. From a revenue generation perspective, these Americans were forecasted to produce more revenues than their counterpart Canadians.
In a European context, the Italian, U.K. and German markets have been identified as having the strongest potentials for generating Aboriginal tourism travellers for Canada. In combination, they were forecasted to be able to generate 8.3 million visitors between 2000 and 2005 **(Table 21, Appendix 1)**.

While relatively strong interest in Aboriginal cultural tourism experiences has been expressed by some Asian travel markets, there is little other consumer information to substantiate the full potential of these markets at the present time.

Short-Haul Markets

Short-haul Aboriginal culture travel markets are motivated by chances to experience Aboriginal products that are active/recreation/outdoor oriented and those that are nature and ecotourism based. More specifically, Canadians are more likely to “step off the beaten path” and look for opportunities that provide excitement, adventure and authenticity. Their key activities include visiting historic and cultural sites, natural areas, going for hikes/backpacking, camping, wilderness lodges, viewing wildlife, birds or flowers and attending local festivals and events, Pow Wows and native dances.

Long-Haul North American Markets

The travel motivations for this Aboriginal tourism market segment are similar to those for short-haul markets. Longer haul markets are seeking a mix of experiences combining active, learning, natural and entertainment dimensions. This group is more likely to take touring vacations by car, especially the US market. As well, the US market is more likely to look for shopping and casino/gambling experiences. Experiencing and learning about Aboriginal culture and hunting, fishing and trapping opportunities will be more popular with the long-haul as opposed to short-haul visitors.

Long-Haul Overseas Travel Markets

Overseas long-haul travel markets interested in Aboriginal tourism experiences are seeking a combination of sightseeing, recreation and cultural experiences. These experiences need to have a strong focus on authentic indigenous products, as well as learning about the local Aboriginal cultures from native guides. Canada’s potential Aboriginal resources and programs suited to inclusion in such experiences are numerous and varied in their focus and location. However, there is a need for packaging these attributes with other components essential to a full travel experience (e.g. accommodation, dining and festivals) if the industry is to be competitive in capturing overseas markets.

2.2 Aboriginal Tourism Product Development Opportunities

In response to growing market interest, numerous reports suggest that there are a wide range of tourism products and services either being created or planned for development by Aboriginal communities and/or entrepreneurs in Canada. Seven types of product development opportunities are summarized in this section. More details concerning these opportunities are identified in the tables accompanying the descriptions of each of these product development groups.

2.2.1. Accommodation Development Opportunities

Aboriginal communities have a significant opportunity to develop accommodations that not only provide an essential tourism support service to travellers, but also can be enticing attractions for visitors. Through the use of appropriate and authentic designs, these accommodation facilities can enhance the overall quality of Aboriginal tourism experiences for tourists. Examples of themed Aboriginal tourism accommodation development opportunities include: backcountry wilderness lodges; eco-lodges; campgrounds with tepees; resort lodges; and bed and breakfast facilities. More detailed descriptions of the general character of these opportunities, their typical geographic locations, the common constraints to their development and sustained operation, as well as exemplary cases of these types of accommodation developments are summarized in **Table 2.2.1**.

Table 2.2.1: Accommodations Development Opportunities

Product Opportunity: Backcountry Wilderness Lodge	
Description	Ecotourism-oriented fly-fishing or hunting lodge with 25-50 rooms. Accommodations designed and decorated in traditional Native style with local crafts. Small restaurant serving traditional Aboriginal cuisine. Hunting, fishing, living as First Peoples once did; horseback riding and hiking (PWC Consulting, 2002)
Geographic Location	Remote, natural areas of all provinces and territories, close to lakes or rivers (PWC Consulting, 2002).
Possible Constraints	Seasonal operation in many locations, remote access required.
Product Opportunity: Eco-lodge	
Description	Ecologically designed building that enhances the surrounding environment, provides interpretation, practices sustainable management, and may be combined with other products (e.g. Native crafts, cuisine, dancing, etc.) to enhance the cultural component (EGSI et al., 2002).
Geographic Location	All provinces and territories, natural, undisturbed setting.
Product Opportunity: Campground	
Description	Campground with spaces for visitors to set up tents/trailers or tepees for rent. May include central lodge for dining, recreation and offering Native arts, crafts or other cultural components (PWC Consulting, 2002; EGSI et al., 2002).
Geographic Location	All provinces and territories; close to other Aboriginal cultural/historic sites.
Possible Constraints	Seasonal operation in many locations, remote access required for backcountry areas.
Strategies for Overcoming Constraints	Make arrangements for other accommodations during winter months (EPGC, 2000).
Best Practices	Warbonnet Lodge (Blackfeet Indian Reservations, Browning, Montana): Offers a central lodge with dining, shower, sauna and lounge. Tourists experience the Native way of life, trail riding and Native arts and crafts (PWC Consulting, 2002).

Product Opportunity: Native-Themed Resort	
Description	Full-service resort offering guests the opportunity to experience traditional Native ways of life and culture. Can include Native cuisine, dancing and crafts in addition to other contemporary resort features (PWC Consulting, 2002).
Geographic Location	All provinces and territories
Possible Constraints	Significant funding is required.
Strategies for Overcoming Constraints	Form partnerships with local businesses and organizations, explore all funding sources.
Best Practices	Buffalo Point Development Corporation, owned by Manitoba's Buffalo Point First Nation, has the primary function of developing an international tourist facility on land owned by the Buffalo Point Nation. World-class marina, an RV campground, luxury rental cabins with Jacuzzis and satellite television, a bar and grill with a Video Lottery Terminal lounge and trails for hiking, biking, cross-country skiing and snowmobiling. Future plans include a golf course, hotel/casino, Aboriginal village theme park with tepee accommodations, horse riding stables, cruise ship, trading post, Aboriginal art gallery, game farm and a museum featuring the history and culture of the Buffalo Point First Nation. Benefits to the First Nation include direct employment opportunities, a market for some private businesses owned by members of the Buffalo Point First Nation and reinvestment of real estate property profits back into the community to fund infrastructure development. Through a solid development plan and careful management, this resort illustrates that Aboriginals can play a leading role in Canada's tourism industry. They have learned the value of learning from other Aboriginal developments and of written agreements to ensure clear understandings between parties (Indian and Northern Affairs Canada, 1997a).

Product Opportunity: Aboriginal-Themed Bed and Breakfast	
Description	Low-capacity accommodations. Rooms decorated with local Aboriginal art/crafts, guests experience Aboriginal cuisine. (Economic Growth Strategies Inc. et al., 2002)
Geographic Location	All provinces and territories

Issues and Constraints for Developing Aboriginal Tourism Accommodations

Issue / Constraint	*Strategies for Addressing Issue/ Constraint*	*Example of Best Practice for Addressing Issue/ Constraint*
Abundant good-quality, non-Aboriginal competing accommodation exists (PWC Consulting, 2002).	Work with visitor centres and local hotel associations to help build awareness of Aboriginal accommodation opportunities (PWC Consulting, 2002).	
Concern over quality of hospitality	Encourage Aboriginals to enrol in hospitality programs at educational institutions (PWC Consulting, 2002).	
Standards of many accommodation facilities are modest (EGSI, 2002)	Upgrades and more regular maintenance may be required (EGSI, 2002). Traditional North American Aboriginal building types, such as tepees, longhouses, wigwams and pithouses, are traditional design forms that can be emulated in new structures (EGSI, 2002). Local natural materials (e.g. logs, wood, stone) should be used (EGSI, 2002).	
Limited range of accommodation facilities, with few in the upper mid-market	Encourage the development of Aboriginal-themed accommodations.	

2.2.2. Food and Beverage Service Development Opportunities

As with accommodations, food and beverage services in Aboriginal tourism destinations also can enhance the quality of the tourism experience for guests. Examples of themed Aboriginal tourism development opportunities of this type highlighted in recent development and market reports include: Aboriginal-themed sit-down restaurants or tea rooms; Aboriginal-themed fast-food or take-out restaurants; Aboriginal-themed catering services; and traditional Aboriginal feasts. More detailed descriptions of the general character of these food and beverage service development opportunities, their typical geographic locations, the common constraints to their development and sustained operation, as well as exemplary cases of these types of operations are summarized in **Table 2.2.2**.

Table 2.2.2: Food and Beverage Services

Product Opportunity: Aboriginal-Themed Sit-Down Restaurants/Tea Rooms	
Description	Restaurants/tea rooms that offer visitors the opportunity to experience traditional Aboriginal cuisine and may be served in a traditional manner (e.g. following customs or using ceremonies or rituals). Staff may wear traditional Aboriginal attire and meals could be served in a more traditional setting (e.g. a recreation of the dining area in which tribes used to eat) (PWC Consulting, 2002; EGSI et al., 2002).
Geographic Location	All provinces and territories, located near other Aboriginal tourism attractions/centres and/or along major tourist transportation routes (PWC Consulting, 2002).
Product Opportunity: Aboriginal-Themed Fast Food Restaurants/Take-Out	
Description	Aboriginal cuisine, such as bannock and buffalo burgers, could be offered in a fast-food/take-out setting (PWC Consulting, 2002; Economic Growth Solutions et al., 2002).
Geographic Location	All provinces and territories, located near other Aboriginal tourism attractions/centres and/or along major tourist transportation routes (PWC Consulting, 2002).
Product Opportunity: Aboriginal-Themed Catering Service	
Description	Catering service that not only offers authentic Aboriginal cuisine, but also can include traditional singing and dancing (PWC Consulting, 2002; GKATA, 2001).
Geographic Location	All provinces and territories closer to larger population centres.
Product Opportunity: Traditional Aboriginal Feasts	
Description	Traditional feast at which guests are invited to experience Aboriginal cuisine, song, dance, storytelling and other activities (EGSI et al., 2002).
Geographic Location	All provinces and territories

Constraints for Developing Aboriginal Tourism Restaurants

Constraint	***Strategies for Overcoming Constraint*** ***Overcoming Constraint***
Abundant good-quality, non-Aboriginal competing restaurants exist (PWC Consulting, 2002)	• Work with visitor centres and local restaurant associations/chambers of commerce to help build awareness of Aboriginal accommodation opportunities (PWC Consulting, 2002).
Concern over authenticity and meeting the tastes and demands of market segments (PWC Consulting, 2002)	• Combine dining experiences with local Aboriginal festivals or cultural demonstrations (PWC Consulting, 2002).
Concern over quality of hospitality	• Encourage Aboriginals to enrol in hospitality programs at educational institutions (PWC Consulting, 2002).

2.2.3. Attraction Development Opportunities

The rich history and culture of Aboriginal people in Canada provides opportunities for a variety of possible tourist attractions to be created. These types of attractions are especially suited to use in broader sets of products and services packaged for long-haul travel markets. Examples of such attraction opportunities identified in recent reports include a wide variety of:

- historic galleries and museums;
- cultural galleries, museums and interpretive centres;
- archaeological sites;
- interpretive and/or historic parks or trails;
- casinos;
- monuments;
- reenactive and/or interactive traditional villages;
- traditional healing retreat centres;
- centres where crafts are produced or displayed; and
- souvenir/gift shops.

More detailed descriptions of the general character of these attraction development opportunities, their typical geographic locations, the common constraints to their development and sustained operation, as well as exemplary cases of these types of facilities are summarized in **Table 2.2.3**.

Table 2.2.3: Attractions (e.g. Museums, Monuments, etc.)

Product Opportunity: Historic Galleries/Museums	
Description	Centres that offer education about Aboriginal history and exhibit artefacts or replicas. Group and self-guided tours (EGSI et al., 2002).
Geographic Location	All provinces and territories. Close to heritage/historical cultural site and near existing infrastructure (EGSI et al., 2002).
Product Opportunity: Cultural Galleries/Museums/Interpretive Centres	
Description	Centres that offer education about Aboriginal ways of life (e.g. industry, art, culture). Potential offerings include museums, interpretive videos, self-guided hiking trails with interpretive signage, storytelling, shows (e.g. dances, ceremonies, rituals), hands-on learning processes and viewing of ancient ruins, burial grounds or significant carvings/drawings (PWC Consulting, 2002; EGSI et al., 2002; Hart et al., 1996). Interpretive centres can act as initial draws (anchors) to the region around which additional experiences can be developed (Hart et al., 1996).
Geographic Location	All provinces and territories. Close to heritage/historical cultural site and near existing infrastructure (focus on situating near major travel corridors and destinations), may be located in provincial, territorial, or national parks (EGSI et al., 2002; Budke, 1999aa; Hart et al., 1996).
Possible Constraints	-Substantial funding would be required initially (EGSI et al., 2002). -A strong educational program and links to other museums and research institutions could enable development to become financially viable.
	- Admission fees for entry into the centre and revenue generated through meetings and special events would also help funding (EGSI et al., 2002). -Use of volunteer groups should be maximized in all appropriate locations (Inns and Associates, 1996).
Product Opportunity: Archaeological Sites	
Description	Locations of archaeological interest. Guided tours or participation in digs for visitors (Economic Growth Solutions et al., 2002; Hart et al., 1996).
Geographic Location	All provinces and territories
Possible Constraints	-Disturbance of culturally important phenomena by tourists.

Product Opportunity: Archaeological Sites	
Strategies for Overcoming Constraints	Local Elders, in concert with proponent developers, determine the physical facilities and suitability of attractions that are open to public viewing/experience (Hart et al., 1996).
Best Practices	*Wanuskewin* Heritage Park has legally binding arrangements that require all initiatives to be approved by Aboriginals (e.g. all archaeological activities, from approval of digs to interpretation/display of artefacts, are reviewed with the local Elders board). Management decisions are structured to ensure Aboriginals' approval (Sadoway, 1999).
Product Opportunity: Interpretive/Historic Parks or Trails	
Description	Parks or trails that educate visitors through signage or guided tours about the cultural significance of the natural environment (e.g. local historic events or Aboriginal stories/legends that revolve around certain natural phenomena). Interpretation of the built environment could also be included (e.g. totem poles, longhouses) (PWC Consulting, 2002; Hart et al., 1996).
Geographic Location	All provinces and territories
Possible Constraints	Disturbance of culturally important phenomena by tourists.
Strategies for Overcoming Constraints	Local Elders, in concert with proponent developers, determine the physical facilities and suitability of attractions that are open to public viewing/experience (Hart et al., 1996). Local Elders identify areas of a proposed development site which will be "off limits" to tourism (e.g. burial grounds or grounds which were used for sacred ceremonies) (Hart et al., 1996).
Product Opportunity: Casinos	
Description	Casinos similar to those found on Indian reserves elsewhere in North America (PWC Consulting, 2002).
Geographic Location	All provinces and territories, close to larger population centres.
Product Opportunity: Monuments	
Description	Statues, plaques, totem poles or other monuments that depict Aboriginal events or lifestyles. Monuments could be included in tours.
Geographic Location	All provinces and territories

Product Opportunity: Reenactive/Interactive Traditional Villages	
Description	Village recreated to reflect a traditional Aboriginal village as it may have stood in a chosen time period. Living conditions, daily routines and roles of tribe members, diet and processes for making and preparing things could be portrayed. Visitors could interact with "characters" (staff). Plays, dances, interpretive signage and technology could be utilized to help visitors understand the traditional way of life. Historical events may be reenacted (e.g. treaty signing, early Euro-Aboriginal contact) (PWC Consulting, 2002; EGSI et al., 2002; Hart et al., 1996).
Geographic Location	All provinces and territories. High profile site near a complementary attraction, major highway or urban centre (EGSI et al., 2002).
Possible Constraints	Significant amount of initial investment may be required (EGSI et al., 2002).
Strategies for Overcoming Constraints	Use initial funding to construct essential buildings but complete the rest of the village on an incremental basis over a number of years (EGSI et al., 2002).
Product Opportunity: Traditional Healing Experience/Retreat	
Description	Visitors explore herbology and the use of traditional medicinal plants in this educational experience. Tourists may participate in healing ceremonies (EGSI et al., 2002; Hart et al., 1996).
Geographic Location	All provinces and territories
Product Opportunity: Crafting Traditional Products/Dwellings	
Description	Visitors engage in a workshop-style experience where they learn about traditional buildings, tools, customs, interpretation and artifacts (EGSI et al., 2002).
Geographic Location	All provinces and territories
Product Opportunity: Souvenir/Gift Shop	
Description	Souvenir or gift shops located near other Aboriginal tourist attractions. Can include crafts, paintings, sculptures, prints, carvings, bead or quill work, jewellery, traditional weapons, clothing, bags, music, books, etc. (PWC Consulting, 2002; Hart et al., 1996)
Geographic Location	All provinces and territories in close proximity to, and collaboration with other Aboriginal tourism products/services.
Possible Constraints	Fraudulent or crass commercialization of traditional crafts and replicas (Hart et al., 1996)
Strategies for Overcoming Constraints	· Certification of authenticity by an authority should occur to ensure all items are genuine (Hart et al., 1996). · Sale of sacred objects (e.g. pipe stems, eagle feathers, medicine bags, treaty parchments) should be strictly prohibited and there should be no replication of these objects (Hart et al., 1996).

Constraints for Developing Aboriginal Tourism Attractions

Constraints	***Strategies for Overcoming Constraints***	***Examples of Best Practices for Overcoming Constraints***
Competition with non-Aboriginal attractions (PWC Consulting, 2002)		
Misperception and lack of interest about the Aboriginal "way of life" (PWC Consulting, 2002)	• Educate public about the Aboriginal history and way of life (PWC Consulting, 2002). • Partner with Parks Canada for interpreting Aboriginal history (PWC Consulting, 2002).	

2.2.4 Tours and Package Development Opportunities

Professionally packaged and marketed tours offering a range of preplanned tourism activities (both Aboriginal and non-Aboriginal) have been suggested as being a prerequisite for competing in the international marketplace. Tour and package components that have been recommended for development by Aboriginal people include:

- cultural interpretation tours (e.g., tours of traditional whale camps, survival or trap-line tours);
- nature tours/ecotourism (e.g., wildlife viewing, ecological studies);
- outdoor adventure/recreation tours (e.g., white water rafting);
- sport hunting or fishing tours;
- tour routes (e.g., self-guided, mapped routes with some form of interpretation);
- community sightseeing tours (e.g., village tours highlighting the past, present and future activities);
- combined travel experiences (e.g., wildlife viewing tour combined with traditional feasts);
- tours highlighting cultural differences (e.g., tours of several different Aboriginal cultures, perhaps between provinces); and
- ethnobotany and/or herbology tours.

More detailed descriptions of the general character of these types of proposed packaged tours, their typical geographic locations, the common constraints to their development and sustained operation, as well as exemplary cases of these types of operations are summarized in **Table 2.2.4**.

2.2.4: Tours and Packages

Product Opportunity: Cultural Interpretation Tours	
Description	Guided tours to educate visitors about the cultural significance surrounding the built and natural environment (e.g. traditional fish/whale camps, stories behind natural formations). Interpretive tours could involve hiking, walking, canoeing, rafting, cruising, snowshoeing, dogsledding, horseback riding, cross-country skiing or cycling. Historic routes with cultural and natural interpretation of significant sites, flora, fauna, and customs may be involved. Dancing, singing, craft making and storytelling are possible activities to be added to the tours (PWC Consulting, 2002; EGSI et al., 2002).
Geographic Location	All provinces and territories
Possible Constraints	Seasonal in some areas.
Product Opportunity: Nature Tours/Ecotourism	
Description	Guided excursions to educate visitors about the natural environment and Aboriginal links to the land and fauna. Wildlife viewing, bird/whale watching, and ecosystem/geological studies could be offered. May take place in provincial or national parks (PWC Consulting, 2002; EGSI et al., 2002; Budke, 1999aa).
Geographic Location	All provinces and territories
Possible Constraints	A variety of quality nature tourism / ecotourism experiences is already offered.
Strategies for Overcoming Constraints	Have efforts endorsed by various highly recognized third parties (e.g. UNESCO, World Wildlife Fund, etc.) to help develop sound conservation programs and bring international recognition and low-cost, highly credible tourism promotion to a destination (Hart et al., 1996).
Product Opportunity: Outdoor Adventure/Recreation Tours	
Description	Excursions for the purpose of outdoor recreation and adventure (cultural or natural components are secondary if present). May include walking, hiking, backpacking, cycling, rafting, kayaking, canoeing, dogsledding and snowshoeing. May take place in national or provincial parks. Flightseeing tours by a local pilot could be offered to view larger wildlife and geological formations (EGSI et al., 2002; Budke, 1999aa).
Geographic Location	All provinces and territories.

Product Opportunity: Sport Hunting and Fishing Tours	
Description	Tours that offer visitors guided sport hunting or fishing experiences in a natural setting (EGSI et al, 2002).
Geographic Location	All provinces and territories
Possible Constraints	•Legislation surrounding hunting of certain traditional species is a threat (EGSI et al., 2002). •Growing public opinion and opposition relating to consumptive activities such as hunting. Hunting and ecotourism are potentially conflicting activities – hunting could be a threat to building a recognized ecotourism product (EGSI et al., 2002). •The stricter border controls for U.S. visitors, especially those engaging in hunting activities, may increase the time and difficulty of travel from the U.S. into Canada (EGSI et al., 2002). •Overly strong focus on fishing and hunting activities (Northwest Ontario) with limited development of other products (EGSI et al., 2002).
Strategies for Overcoming Constraints	•Diversify the tourism product base, especially in northern regions (EGSI et al., 2002).
Product Opportunity: Survival and Trap-Line Tours	
Description	Visitors are offered guided interpretation of traditional survival and trap-line techniques, combined with a broader nature interpretation experience (EGSI et al., 2002).
Geographic Location	All provinces and territories.
Product Opportunity: Tour Routes	
Description	Mapped out and marketed itineraries which link several Aboriginal tourism products (e.g. museums, accommodations, hiking trails, crafts) within a geographic area. Packages could be built around themes relevant to target markets, such as culture and history, adventure and ecotourism and/or experiential. Tour routes are typically explored by car or tour bus and can range from short two-hour routes to multi-day excursions. Routes are typically marked with signs that provide users with direction and interpretation. Additionally, users could purchase a CD or cassette at the start of the route that provides them with a narrative explaining the stories and sights of the route, timed to an average driving speed (PWC Consulting, 2002).
Geographic Location	All provinces and territories.

Product Opportunity: Community Sightseeing Tours	
Description	Tours that focus on past, present and future culture of a particular village (EGSI et al., 2002).
Geographic Location	All provinces and territories.
Product Opportunity: Combination Packages	
Description	Packages that combine several aspects of Aboriginal tourism could be created (e.g. wildlife viewing tour combined with an Aboriginal feast). Packages could be geared towards subsegments within the Aboriginal tourism market segment (e.g. families vs. individuals). May use tour wholesalers and wholesalers into the international marketplace. Potential to link with railway packages. A variety of types and lengths of packages should be developed (EGSI et al., 2002; PWC Consulting, 2002).
Geographic Location	All provinces and territories.
Best Practices	*The Anishinabe Experience*, an Aboriginal tourism operator in Ontario, partnered with a variety of groups (e.g. other operators, Parks and dining facility) to develop an itinerary to encourage travellers to reroute their schedule to travel through the Ottawa Valley (EPGC, 2000).
Product Opportunity: Packages/Tours Highlighting Cultural Differences	
Description	Differences between different Aboriginal cultures within and amongst provinces can be keyed upon and used to package an all-encompassing tour that provides experiences in not just one Aboriginal culture, but several (Hart et al., 1996; EPGC, 2000).
Geographic Location	All provinces and territories.
Product Opportunity: Ethnobotany/Herbology Tours	
Description	Interpretive walks where guides teach visitors about the traditional uses of herbs and plants by Aboriginal peoples (EGSI et al., 2002).
Geographic Location	All provinces and territories.

CONSTRAINTS FOR DEVELOPING ABORIGINAL TOURISM TOURS AND PACKAGES

Constraints	***Strategies for Overcoming Constraints***	***Examples of Best Practices for Overcoming Constraints***
Lack of prepackaged Aboriginal tours	• Facilitate cooperation among Aboriginal businesses. • Demonstrate the economic benefit of forming partnerships and packages (PWC Consulting, 2002). • Suppliers should partner to provide the opportunity to offer customers unique packages and variety (Inns and Associates, 1996).	
Operators find it difficult to deal with park agencies (Pam Wight and Associates, 2001)	• Create industry associations, working groups and planning forums to foster a high level of trust and dialogue between park agencies and operators. • Create a program to educate Parks staff and Aboriginals about their relationship to one another, and how they can work together to provide a quality tourism product that provides accurate information about Aboriginal history and culture. • Create cooperative management arrangements in park/protected areas that encourage "long and enduring relationships" of mutual trust and credibility between Aboriginal and non-Aboriginal people (Budke, 1999aa). • Ensure that effective and open communication channels exist in cooperative management regimes. Communities should be consulted in order to assess the most productive methods of communicating (e.g. some Elders may not be able to read, making newsletters less effective) (Budke, 1999aa). • Utilize an outside facilitator to address the concerns of all interest groups (Budke, 1999aa).	*The Wilderness Tourism Association of the Yukon* provides a link between operators and the Parks agency. The association: provides a communication conduit for operators; discusses the needs of all parties; fosters an understanding of issues (e.g. trends, visitor numbers, demographics, visitor needs); understands that all parties must be realistic; views operators as service providers for Park visitors; develops regulations; and, assists with reporting, enforcement and proactive safety measures and actions (Pam Wight and Associates, 2001). The *Cultural Training in Indian Law for National Parks Interpretive Guides* is a course developed for the National Parks Service in the United States. It is designed to improve park-tribal relations and to ultimately improve the quality of park educational programs that relate to Native American Indian history and culture. It was developed as an interagency course for federal land managers and cultural/natural resource specialists to inform them about the contents and history of American Indian law and the consequential federal responsibilities towards Native resources on Indian lands and on non-Indian federal lands. Tribal members also attend courses not only as students, but also as teaching resources (WTTHRC, 1999).

CONSTRAINTS FOR DEVELOPING ABORIGINAL TOURISM TOURS AND PACKAGES

Constraints	*Strategies for Overcoming Constraints*	*Examples of Best Practices for Overcoming Constraints*
		Members of the Wapusk cooperative management board achieved a "sense of comfort" by engaging in "fun" activities after group meetings (e.g. going out for a meal, taking a tour through the park together). Mutual trust, respect, faith, friendship and team spirit were therefore established (Budke, 1999a).
Difficult to establish boards or cooperative structures for parks that represent all groups/demographics, in areas where there is a high number and diversity of affected Aboriginals (Budke, 1999).	• Hold working groups and round tables with annual general meetings for all interested groups (Budke, 1999).	Riding Mountain Roundtable (to review the park management plan) involved 20 people representing 35 stakeholders (e.g. 3 First Nations, local chamber of commerce, various NGOs). They meet biannually as an advisory committee and use a consensus approach (Budke, 1999).
Difficulty in obtaining permits/business licenses in parks and protected areas. Significantly fewer Natives than non-Natives are given permits in many parks (Budke, 1999a; PWC Consulting, 2002).	· Allocate a certain proportion of licenses to Aboriginal people. Bidders for licenses who show a commitment to hire Aboriginal people should get preferred consideration (Budke, 1999a). · Non-Aboriginal licensees could be required to train Aboriginal people in respective services so that Aboriginal people can later take on these services (Budke, 1999a).	
Increasing levels of restriction for operators that use national or provincial parks for their products and programs. Restrictions of the locations they are able to use, trail access and re-enactment activities hinder their operations (PWC Consulting, 2002).	· Operators and parks need to work together to find a balance of access and environmental protection that benefits both parties (PWC Consulting, 2002).	
License application and consultation processes can be a major roadblock to prospective tourism entrepreneurs or outfitters – it can be complex and can be a lengthy process, sometimes exceeding one year (Northwest Territories) (Notzke, 1997).	· In-house educational process could be used to inform entrepreneurs who are less familiar with the requirements (Notzke, 1997).	

CONSTRAINTS FOR DEVELOPING ABORIGINAL TOURISM TOURS AND PACKAGES

Constraints	***Strategies for Overcoming Constraints***	***Examples of Best Practices for Overcoming Constraints***
Some Aboriginal communities or individuals may oppose tourism development in order to protect the integrity of their land-based economy and way of life from interference or misrepresentation of activities by the tourism industry (Notzke, 1997).	· Sensitive management of locations or resources that are important to Aboriginal land-based economies and are of interest to the tourism industry (Notzke, 1997). · Develop and implement guidelines or codes of conduct for various activities to protect both culture and the natural environment (Sadoway, 1999).	Tourism Guidelines for beluga-related tourism activities in Inuvialuit (Northwest Territories): Hunters’ and Trappers’ Committees of harvesting communities have the authority to strictly control access/other activities in harvesting zones, camps and vicinities thereof. Subsistence hunting takes priority over any tourism activities. The Committees designate areas that may be used for tourism, but retain the right to impose limitations on these activities. Operators must have written consent from the Committees and from camp owners as a condition to receive licences, and written consent must also be given to allow photographs or video footage of harvesting or related activities. Other harvesters’ concerns are addressed by the Tourism Guidelines, as are mammal harassment, artefact removal, garbage disposal and aircraft restrictions (Notzke, 1997). Concerned over vandalism of Gwaii Haanas, Parks Canada developed a handbook for visitors with input from the *Gwaii Haanas Watchmen*. A mandatory pre-trip visitor orientation is required at which the handbook is distributed. Codes of conduct for visiting sensitive sites, appropriate behaviour and guidelines concerning animal species, etiquette to follow with regards to camping, garbage and human wastes, and information on hazards/personal safety are included (Sadoway, 1999).

2.2.5 Festivals and Event Development Opportunities

Festivals and events provide powerful incentives for tourists to visit unfamiliar or distant destinations. Both domestic and international travellers are drawn to well-run and culturally unique festivals and events. Several existing and potential Aboriginal festivals and events have been recommended for inclusion in the marketing of Aboriginal tourism opportunities. These include:

- Powwows;
- Aboriginal celebration days (e.g., celebrating a particular village/community);
- Historic celebrations (e.g., treaty signing);
- Conferences (e.g., related to Aboriginal tourism);
- Sports competitions (e.g., dogsled racing);
- Nature festivals (e.g., festival to celebrate spawning salmon).

More detailed descriptions of the general character of these festivals and events, their typical geographic locations, the common constraints to their development and sustained operation, as well as exemplary cases of these types of operations are summarized in **Table 2.2.5**.

Table 2.2.5: Festivals and Events

Product Opportunity: Pow Wow	
Description	Visitors participate in traditional ceremony. Can include education, food, sporting activities, hand games, competitions, dancers, religious ceremony, crafts and tepee rings (PWC Consulting, 2002; EGSI et al., 2002; Hart et all, 1996).
Geographic Location	All provinces and territories
Product Opportunity: First Nation Celebration Days	
Description	Festival celebrating a particular community, village, tribe or Aboriginals in general. Visitors can witness or participate in a wide variety of Aboriginal cultural activities (Inns and Associates, 1996).
Geographic Location	All provinces and territories
Possible Constraints	Difficulty in obtaining widespread awareness
Strategies for Overcoming Constraints	Use a variety of promotional tools to spread knowledge about festivals and other events.
Best Practices	*Red Earth Native American Cultural Festival*, which takes place in Oklahoma City, is the world's largest American Indian cultural festival and has been held for over 10 years (in 1996). People from over 100 tribes from across North America are invited to experience an extremely wide range of Native-themed activities and services. Festival organizers have learned that good visuals are essential to promote the event (brightly coloured and very detailed brochure). Public service announcements, magazine advertisements and word of mouth also contribute to the awareness of the festival. Half the paid staff working on the festival are Native, but there is no Tribal involvement in the festival (this receives criticism from Native groups). Nonetheless, this festival won the National Cultural Heritage Award presented by the Travel Industry Association of America (Inns and Associates, 1996).
Product Opportunity: Historic Celebrations	
Description	Celebrations highlighting important Aboriginal events (e.g. treaty signing).
Geographic Location	All provinces and territories

Product Opportunity: Conferences	
Description	Conferences relating to Aboriginal issues (PWC Marketing, 2002).
Geographic Location	All provinces, close to larger population centres that can accommodate higher tourist volumes.
Product Opportunity: Competitions	
Description	Annual competitions that visitors could witness or participate in (e.g. races in traditional Aboriginal-style canoes, dogsled races, other sporting events). (EGSI et al., 2002).
Geographic Location	All provinces and territories
Product Opportunity: Nature Festivals	
Description	Festivals celebrating nature (e.g. salmon spawning festivals, whale jamboree). Residents and visitors are educated about the importance of the natural phenomenon to both the environment and culture of the area. Local arts and crafts and cuisine relating to the celebration could be offered.
Geographic Location	All provinces and territories

Constraints for Developing Aboriginal Festivals and Events		
Constraints	***Strategies for Overcoming Constraints***	***Examples of Best Practices for Overcoming Constraints***
	Promotion through brochures and flyers and celebrity visits to generate media coverage can greatly enhance awareness (Inns and Associates, 1996).	Difficulty in obtaining widespread awareness of festivals and events

2.2.6 Tourism Support Service Development Opportunities

Because of the often remote and/or rural locations of many Aboriginal communities, a wide range of infrastructure is needed to support the creation of Aboriginal tourism opportunities. As a consequence, a range of supportive business facilities and services are required to accommodate future core tourism development options. Typical support facilities and services recommended include:

- ferries/shuttle services;
- gas/propane/diesel bars;
- laundry facilities;
- sporting supplies;
- convenience/grocery stores;
- conference rooms;
- recreation areas (pool table, arcade, etc.);
- dressmaking businesses (e.g., for casino/dancer/reenactment uniforms and costumes); and
- non-Aboriginal themed accommodations and food/beverage services.

2.2.7 National Park and Historic Site Cooperative Development Opportunities

Aboriginal tourism development associated with initiatives in Canada's national protected areas and parks has received increasing attention in recent years. This reflects the rising interest of international and domestic markets for Aboriginal tourism products and services linked to experiencing areas with outstanding and distinctive natural and cultural landscapes. Several Aboriginal communities in and around such federal, provincial and territorial protected areas have begun to explore the potential of creating tourism developments that capitalize on the assets of these areas. In some cases, Aboriginal communities and Parks Canada have established cooperative arrangements concerning the creation and delivery of a range of Aboriginal tourism experiences – many of which deal with interpretative and touring services.

From policy and program perspectives, the linkages between Aboriginal groups and Parks Canada in a tourism context seem complementary. Tourism is perceived by many Aboriginal groups as an opportunity to preserve and communicate their values, heritage and customs to non-Aboriginal travellers, thereby enhancing cross-cultural understanding and learning. These goals parallel Parks Canada's commitment to commemorate cultural heritage and to further Aboriginal employment and economic development. In 1999, Parks Canada initiated a National Aboriginal Secretariat that was designed to provide guidance on how to best develop and implement tourism initiatives in protected areas in cooperation with interested Aboriginal people (Parks Canada, 2000).

Tourism opportunities differ depending on specific physical and cultural environments as well as the resources, goals and capacities of Aboriginal communities and Parks Canada. However, **Table 2.2.6** provides an overview of the types of tourism development opportunities that have been identified in various Parks Canada protected area and historic site contexts.

Table 2.2.6: Summary of Aboriginal Tourism Opportunities Associated with Canadian National Parks and Sites

Accommodation	Transportation
· (wilderness) campgrounds · rustic cabins · eco-lodges, tents · resorts	· ferry and water taxi service · bus service · tour transportation · maintenance of trails, transport routes
Food and Beverage	**Arts and Crafts**
· traditional (salmon) BBQs at the beach · cafes, restaurants, bakeries, food stands serving traditional Aboriginal dishes · convenience stores · catering services · wild food cooperatives and tours	· galleries/shops · studios (with opportunities for visitors to watch artists at work, such as carvers, basket makers, painters and printers) · artisan cooperatives
Culture-based Events and Attractions	**Nature-based Events and Attractions**
· story-telling · cultural performances (drumming, dancing and singing) · traditional skills demonstrations · cultural interpretive talks · teepee-based heritage interpretation programs led by Aboriginal guides · guided tours (in person or taped) of Aboriginal cultural sites (e.g., archaeological sites and digs; culturally modified trees; petroglyphs; traditional fishing and trapping sites) · reenactment of a traditional whale hunt · Aboriginal heritage sites/National Historic Sites · cultural (interpretive) centres · cultural camps · First Peoples' festival · "Aboriginal Cultural Adventures" · archaeological digs · visitor centre with exhibit space and related revenue areas, interpretative trails, Elders centre and traditional roundhouse · carving skill demonstrations	· guided canoe and kayak tours (in traditional vessels) · river rafting · kayak and canoe rentals · horseback riding · fishing excursions and boat tours · guided and self-guided hikes on traditional trail systems featuring Aboriginal resource use and management as well as related cultural beliefs and traditions · wild food tours (including traditional Aboriginal knowledge and opportunities to sample and buy traditional forest and ocean-based food products such as wildberry jam, dried mushrooms, and seafood) · marine mammal watching · storm watching · scuba diving · stream restoration projects (similar to Parks Canada's "Research Adventures")

Source: I. Budke (2000). Aboriginal Tourism in Canada's National Parks: A Framework for Cooperation: Summary Report. School for Resource and Environmental Management, Simon Fraser University.

Principles of Cooperation

For opportunities such as those listed in Figure 2.1 to be realized there are a number of prerequisites that need to be met by both Parks Canada and Aboriginal groups (Budke 2000 and Parks Canada 2000). These prerequisites set the context for cooperative and synergetic relationships associated with Aboriginal tourism development in Canada's protected areas and historic sites.

Integration of Aboriginal Tourism into Parks Canada's Operations

In order to make Aboriginal tourism development in national protected areas and historic sites feasible, Parks Canada maintains that it must be compatible with its guiding policy and principles frameworks. These include a wide range of policies and management planning principles including those associated with: the National Parks Act; Parks Canada's Guiding Principles and Operational Policies; Parks Canada's national business plan; as well as business and human resource plans for each field unit, and management plans and /or guidelines for individual parks and sites. While this list of frameworks appears formidable, currently there is a relatively strong predisposition within Parks Canada to create and implement tourism-related cooperative arrangements with Aboriginal groups.

Aboriginal Access to Heritage Resources

The certainty of long-term access to the natural and cultural resources of specific protected key areas for tourism development purposes is necessary for ensuring the longer term sustainability of Aboriginal tourism business; and facilitating the transfer of traditional knowledge between Aboriginal Elders and their youth. The Canada National Parks Act appears to be especially predisposed toward developing Aboriginal cultural tourism initiatives associated with demonstrations of traditional hunting and fishing methods, as well as the use and preparation of traditional food plants.

Strengthened Aboriginal Human Capacity for Tourism Delivery

The tourism industry should be built on the relationship between hosts, guests and place. Without hosts who are motivated, trained and qualified to welcome guests at their place or territory, tourism is virtually unsustainable. Consequently, local people play a most significant role in Aboriginal tourism development in protected area settings. Aboriginal communities need more people with tourism-related qualifications and skills, as well as role models who are motivated to become engaged in such development programs. The sharing of expertise and knowledge between Parks Canada and Aboriginals with respect to tourism management is currently being encouraged.

Provision of Adequate Tourism Infrastructure / Facilities

Aboriginal tourism development requires access to appropriate levels of public infrastructure (e.g. water supply, sewage and waste disposal, lighting and power, fire protection, retail outlets, and accommodation, health and security services.). Such infrastructure is normally very limited in most protected areas. Selecting development sites proximate to protected areas, which have either direct access to, or the potential to create such infrastructure is especially critical to establishing the overall competitiveness of Aboriginal tourism products and services. Currently Parks Canada is not predisposed to the creation of more infrastructure within its protected areas, and development in areas proximate to parks is not encouraged.

Financial Support / Funding

Access to appropriate levels of funding for Aboriginal tourism program development and delivery is fundamental to ensuring the creation of market-ready products and services. Accessing sufficient loans and grants for such developments is one of the most fundamental challenges confronting Aboriginal people attempting to develop tourism opportunities associated with protected areas. Land claims agreements associated with northern national parks have included funding for economic development linked to tourism projects.

Sustainable Revenues

The continued success of tourism enterprises is dependent on the generation of sustainable revenues. Sustainable revenue generation may be difficult to attain in protected areas due to: the remoteness and/or inaccessibility of sites to visitors; park policies restricting visitation levels due to conservation factors; market seasonality constraints; the limited visitor carrying capacity of specific facilities and activities; and the limited availability of complementary market support from Parks Canada. Often those tourism pursuits promising high levels of visitor revenues are either limited in their appropriateness and/or scale of operation within Parks Canada boundaries. Development options focusing on programs in higher trafficked areas within protected areas and sites should be first priority options for Aboriginal tourism development.

Aboriginal Community Support

The broader community support of Aboriginal tourism is critical to the sustainability of such developments in most regions of Canada. Such support is needed in order to ensure: appropriate forms of land use and resource management; reductions in the probabilities of negative sociocultural impacts; and the provision of an equitable distribution of socioeconomic benefits for the community. Currently there are an increasing number of Aboriginal communities that are recognizing and supporting the development of Aboriginal tourism in association with protected areas.

Learning from Examples

Cooperation between Parks Canada and First Nations is essential for creating sustainable Aboriginal tourism opportunities. Partnering with Parks Canada offers opportunities for Aboriginal groups to use the agency's world-wide reputation, facilities and expertise to facilitate the implementation of export-ready Aboriginal tourism programs. Parks Canada can benefit from the cultural enrichment of its protected areas and historic sites that could result from some forms of Aboriginal tourism development. Currently there appears to be a mutual desire to strengthen the cooperative relationships between Aboriginal communities and Parks Canada. To cooperatively develop Aboriginal tourism, these potential partners need to become more aware of those practices which have worked well or have failed in past and ongoing working relationships. Much can be learned from the types of cooperative activities that already exist. Examples of ongoing cooperative Aboriginal tourism initiatives in Canada's National Parks and Historic Sites include:

- the Champagne and Aishikik agreement with Kluane National Park to have first right of refusal in providing commercial horseback riding operations, motor-assisted boat tours, motor vehicle assisted shuttle services, and the construction of trails, maintenance roads and retail outlets in the Park;
- the Haida Watchmen Program at Gwaii Haanas designed to use Haida people as guardians at culturally significant heritage sites in the protected area; the Quu'as Program at Pacific Rim National Park Reserve which services the West Coast Trail through the joint venture of Pacheedaht, Ditidaht and Huu-ay-aht communities;
- the visitor and cultural interpretive centres in Pangnirtung and Pond Inlet associated with Auyuittuq and North Baffin National Parks; and
- the "Southquill Camp" cultural centre in Riding Mountain National Park which is operated as Anishniabe Village Inc. (Budke 1999).

2.2.8 Summary

Based on this analysis, it is clear that while the range of Aboriginal tourism products and services in Canada is still in an emerging stage of development, possibilities for expanding the portfolio of such facilities and operations abound. However, despite the exemplary cases of some very successful Aboriginal tourism businesses, many existing and proposed developments have experienced constraints that have impeded their progress towards sustained operation. These challenges are linked to issues of human and physical capacity building, tourism product awareness, partnership development, and access to resources. These hurdles to development are discussed in more detail in the next section of this report.

2.3 Constraints and Issues Affecting Aboriginal Tourism Development

As suggested in the preceding section, there is a vast array of tourism opportunities potentially available for development by Aboriginal people in Canada. Many of these appear to match well with the interests of domestic and international travellers. However, a number of overriding constraints and/or issues exists which hinder the full and sustainable development and delivery of these opportunities. Existing reports highlight five recurring constraints or issues which are affecting the creation of more sustainable forms of Canadian Aboriginal tourism.

2.3.1 Information, Education and Training Constraints

Many Aboriginal people in Canada have difficulty accessing the information, education, and training necessary to develop and manage successful and sustainable tourism practices. In order to encourage the development of appropriate and high-quality tourism products, the following issues must be addressed:

- *Limited Awareness of Benefits of Tourism Development:* Many Aboriginal individuals and communities have not developed tourism products because they are not aware of the associated potential benefits. Strategies to educate prospective entrepreneurs about how they and their communities can benefit from appropriate tourism development need to be implemented.
- *Limited Knowledge about Available Programs/Services to Help Build Business:* There is a considerable lack of understanding amongst potential and existing Aboriginal tourism entrepreneurs about the programs and services available to help them create and sustain successful businesses. Better efforts need to be made to disseminate information to communities about the sources of technical, informational, marketing and funding assistance available to tourism enterprises.
- *Lack of Business Skills:* Many potential and existing Aboriginal tourism entrepreneurs lack business skills related to business management, staff training, developing business plans and pricing strategies, and marketing. Business owners need to be more aware of and encouraged to enrol in educational programs (especially those catering specifically to Aboriginal entrepreneurs) that exist to help them improve their business skills.
- *Lack of Customer Service/Hospitality Training:* Aboriginal tourism staff are generally not trained in providing superior customer service and hospitality to guests. Business owners need to be informed of programs (especially those catering to Aboriginal businesses) to help train their staff.

Table 2.3.1 provides a summary of these information, education and training constraints and identifies proposed strategies and exemplary practices (where available) for dealing with these concerns.

Table 2.3.1: Information, Education and Training

Constraint / Issue: Limited Awareness of the Benefits of Tourism Development		
Description of Constraint/Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Although there is a considerable opportunity to expand the current participation of Aboriginal tourism operators nationally (Saulis, 2001), there is a lack of awareness of the benefits created by Aboriginal tourism (PWC Consulting, 2002; Hart et al., 1996). Very few Aboriginal products have been sufficiently developed (Hart et al., 1996).	• Create a communications plan to enhance the awareness about benefits associated with Aboriginal tourism development (PWC Consulting, 2002). A presentation which demonstrates the importance of Aboriginal tourism for community economic development and that provides examples of success stories could be given to Band councils, interested tourism stakeholders and communities at large. Presentations should be given by Aboriginal tourism entrepreneurs and coordinated by Treaty administration or community officials (EGSI et al., 2002). • Form a strategic planning session with key stakeholders (e.g. appropriate government officials, Aboriginal tourism operators, Economic Development Officers, Aboriginal tourism associations) to discuss how to increase support for and participation in Aboriginal tourism (Saulis, 2001). • Educate Aboriginals about how tourism can play a significant role in alleviating high unemployment rates amongst Aboriginal peoples (Hart et al., 1996).	
Band politics can often interfere with the successful operation of a tourism business (PWC Consulting, 2002) .	• Educate bands about the economic opportunities of well-run Aboriginal tourism businesses (PWC Consulting, 2002).	

Constraint/Issue: Limited Knowledge about Available Programs/Services to Help Build Businesses		
Description of Constraint/Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Many Aboriginal business owners do not know where to obtain relevant information about programs and services available to them to help them build their businesses.	· Information on programs and services at federal, provincial and municipal levels should be provided (Saulis, 2001). · Tourism enterprises should have access to ongoing advice and technical assistance through the local or regional Aboriginal economic development office. A list of available resources, websites, development directories and documentation should be provided (EGSI et al., 2002).	
Constraint/Issue: Lack of Business Skills		
Description of Constraint/Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Limited experience and training in tourism business management, including developing business plans, pricing strategies and business expansion (PWC Consulting, 2002; EGSI et al., 2002; Saulis, 2001; Hart et al., 1996; GKATA, 2001).	· Develop Aboriginal-based tourism training programs to assist and educate operators about the tourism industry and to train those interested in working for a tourism operator or gaining knowledge of the industry (PWC Consulting, 2002; Hart et al., 1996). · Increase education and training on issues such as tourism-based and small business management and service in the tourism industry. Existing avenues of training, such as the Canadian Tourism Human Resource Council, should be utilized (PWC Consulting, 2002).	

Constraint/Issue: Lack of Business Skills		
Description of Constraint/Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
A study of Southern Ontario Aboriginal tourism businesses found that only 34% of owners and 23% of employees had formal training in their area of business (GKATA, 2001).	· Training priorities need to be addressed. These include front line staff training, new entrepreneur training, product development potential, under-standing the marketplace, business manage-ment, training local people to deliver, board and member, business development and literacy (Hart and Steadman, 1997). Create/utilize relationships with tourism education bodies to deliver a significant portion of required industry training (Hart and Steadman, 1997). · Business plan seminars and workshop-style training sessions can help Aboriginals under-stand how to establish and organize their businesses (Saulis, 2001; Hart et al., 1996). · Financial assistance is needed to attain the business management training needed (GKATA, 2001).	
Issue/Constraint: Lack of Customer Service/Hospitality Training		
Concern over quality of front-line staff	· Programs specifically tailored to educate Aboriginal staff should be created and implemented.	First Host (developed in BC), a similar program to SuperHost, but which caters to Aboriginals in developing the skills of front-line staff (EGSI et al., 2002).

2.3.2 Marketing Constraints

There are several recurring weaknesses associated with current levels of marketing activity for Aboriginal tourism. In order to develop greater awareness of existing products that are suited to current and potential Aboriginal tourism markets, the following issues need to be addressed:

- *Fragmented/Weak Marketing:* Many Aboriginal communities work in isolation on tourism projects and, in most cases, do not include surrounding communities in their planning process. Aboriginal tourism businesses and communities should be encouraged to work together (with other Aboriginal and non-Aboriginal businesses, communities and organizations) in order to effectively conduct market research, and to develop appropriate products and promotional campaigns.

- *Lack of Marketing Skills and Resources:* Aboriginal tourism business owners and communities often lack the skills and resources necessary to create and implement suitable marketing strategies. Education and training in tourism business marketing should be offered to Aboriginal entrepreneurs. Additional resources (e.g. informative websites, Aboriginal tourism marketing organizations, funding for collaborative marketing efforts, etc.) need to be readily accessible.

- *Limited Understanding of Markets:* A lack of marketing skills and resources and fragmented marketing efforts have resulted in a limited understanding of how to attract existing long- and short-haul Aboriginal tourism markets. Market information should be collected and distributed to Aboriginal businesses and communities so that they may make informed business decisions about how to effectively inform the marketplace of their offerings.

- *Limited Awareness of Products by Markets:* Because there is limited understanding of Aboriginal tourism markets, little has been done to effectively promote Canadian Aboriginal tourism to potential tourists. As a result, prospective tourists are unaware of the many experiences that Canadian Aboriginals have to offer them. A comprehensive promotional campaign needs to be developed and implemented in order to attract domestic and international travellers to Aboriginal tourism destinations.

Table 2.3.2 provides a summary of these marketing constraints and identifies proposed strategies and exemplary practices (where available) for dealing with these concerns.

Table 2.3.2: Marketing

Constraint/Issue: Fragmented/Weak Marketing		
Description of Constraint/Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Marketing of Aboriginal tourism is fragmented and weak (Alberta) (PWC Consulting, 2002). Many Aboriginal communities work in isolation on community tourism projects and, in most cases, do not include surrounding communities in their planning process (Saulis, 2001).	· Create a strong, centralized marketing body to increase awareness of Aboriginal tourism opportunities within communities and to allow the development of products in accordance with market requirements (PWC Consulting, 2002). · Community-based tourism destination marketing needs to take place for promotion of community tourism attractions, facilities, activities and features (EGSI et al., 2002). · Create an organization that unites operators to promote Aboriginal tourism and to identify partnering opportunities (PWC Consulting, 2002). · Develop a long-term vision and marketing strategy for Aboriginal tourism (PWC Consulting, 2002). · Remind operators that while they compete against each other, they need to present a united front to attract Aboriginal tourism visitors (PWC Consulting, 2002). Product consolidation (assembling more than one Aboriginal product for the purposes of marketing) needs to take place (Inns and Associates, 1996). · Establish a network between Aboriginal businesses/individuals in the tourism industry so that they may communicate, share information, promote each other's products and services, and share challenges and successes with each other (Saulis, 2001). · Strengthen marketing partnerships with regional tourism associations (EGSI et al., 2002; EPGC, 2000).	The *Indian Pueblo Cultural Centre* (New Mexico): the entire group of business owners/operators assemble their products into one marketing instrument to distribute to the public through catalogues and tour guides. The Centre also uses co-operative advertising with other local museums (Inns and Associates, 1996).

Constraint/Issue: Lack of Marketing Skills and Resources		
Description of Constraint/Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Some Aboriginal business owners lack skills in developing promotional materials, such as brochures, websites and business cards (Saulis, 2001). There is concern over the quality of promotional material.	· Provide training in marketing/promotional activities (EGSI et al., 2002). · Special attention should be paid to the development of effective websites/using the Internet as a marketing/promotional tool (EGSI et al., 2002). · Ensure the production of press releases and visuals (e.g. brochures, posters, videos, etc.) is attractive and high quality (Inns and Associates, 1996).	
Many Aboriginal business owners lack knowledge on how to promote their products and services (Atlantic Canada) (Saulis, 2001).	· Operators need to be educated about niche marketing (Hart and Steadman, 1997).	
Aboriginal tourism associations have limited resources to engage in marketing (e.g. Northern Ontario Native Tourism Association) (EGSI et al., 2002).	· Increase public and private sector support in order to strengthen Aboriginal-specific marketing initiatives (EGSI et al., 2002).	

Constraint/Issue: Limited Understanding of Market

Description of Constraint/Issue	*Strategies for Addressing Constraint/Issue*	*Examples of Best Practices for Addressing Constraint/Issue*
Limited understanding of the Aboriginal tourism market segment (PWC Consulting, 2002); lack of specific market research (Hart et al., 1996)	· Tourism market information, especially relating to Aboriginal tourism, should be collected and disseminated to Aboriginal tourism operators to help them make informed decisions regarding their product, level of development, pricing, etc. (PWC Consulting, 2002). · Need to determine the advertising/promotional vehicles that should be used and the messages that need to be communicated to entice people to experience Aboriginal culture (PWC Consulting, 2002). · Aboriginal tourism stakeholders need to: - Determine their geographic target markets - Assess product modifications as required to ensure products/packages appeal to the relatively high-end, well-travelled and educated travellers - Determine how to best access the marketplace - Carefully monitor the effectiveness of product development and marketing/ promotional activities (EGSI et al., 2002; EPGC, 2000).	

Constraint/Issue: Limited Awareness of Products by Market		
Description of Constraint/Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Limited awareness of Aboriginal tourism products by the market (PWC Consulting, 2002)	· Work with key players (e.g. visitors bureaus, local tourism associations, other operators, etc.) to help build awareness/visibility in the market and to develop packages (PWC Consulting, 2002; Inns and Associates, 1996; EPGC, 2000). · Enhance packaging efforts of Aboriginal tourism products by understanding market demands and available products, and promoting them appropriately (PWC Consulting, 2002). · Hold Aboriginal trade shows so that entrepreneurs can display their products and services. Additionally, brochures, travel guides, magazine and newspaper ads should be used to promote Aboriginal products (Saulis, 2001; Hart et al., 1996). · Create a logo for Aboriginal cultural products (Ron Rivard Management, 1998). · Photography and video documentation of Aboriginal tourism products to be used for marketing and promotional activities, as well as for training and communicating to Aboriginal tourism stakeholders (EGSI et al., 2002). · Product ranking (rewards to outstanding tourism suppliers/outfitters) can assist in marketing organizations or destinations (Inns and Associates, 1996).	*Manyallaluk*, a small Aboriginal community southeast of Katherine, Australia, has successfully utilized several marketing techniques. Brochures are distributed by the Northern Territory Tourist Commission, by the Manyallaluk themselves, and through another partnership. Attendance and involvement in state/national travel shows, general advertising, and promotion in tourist publications have been part of their marketing efforts. The combination of techniques has resulted in an increase in international tourists and in the number of inquiries from international sources, an increase in the number of direct bookings from independent tourists domestically and internationally, articles in international press, and word-of-mouth has generated increases in tourists from the local area (Inns and Associates, 1996).
Strong competition internationally for cultural products, hunting, fishing and ecotourism (EGSI et al., 2002).	· Examine and implement strategies to attract international tourists. · Undertake detailed market research to determine the desires and needs of international cultural tourists. · Create marketing campaigns aimed at the "long-haul visitor." Collaborating with internationally oriented organizations can facilitate this (Inns and Associates, 1996). · Develop globally unique and authentic tourism products (Inns and Associates, 1996).	

Constraint/Issue: Limited Awareness of Products by Market		
Description of Constraint/Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Lack of signage indicating the location of some facilities/ attractions (PWC Consulting, 2002)	• Work with provincial government and local/ provincial travel associations to increase signage of attractions along major transportation routes (PWC Consulting, 2002).	

2.3.3 Image and Attitude Constraints

Image and attitude can play a critical role in determining the success of tourism undertakings. Aboriginal tourism in particular faces a number of issues related to image and attitude that have the potential to negatively affect the industry in Canada:

- *Negative Labour Force Attitudes:* Tourism is often seen by the labour market as low paying with few opportunities. Although this is true to some extent due to the structure of the industry, these negative attitudes can hinder the quality of service offered by tourism businesses. This can create a negative perception of Canadian Aboriginal tourism amongst visitors. A "tourism industry image change" program designed to highlight tourism job opportunities as being worthwhile and rewarding employment and career paths for Aboriginal people needs to be developed.

- *Negative Image of Aboriginal Peoples:* Current political and social problems that are perceived to be associated with Aboriginal people in Canada have created a negative or apprehensive image of them amongst some non-Aboriginal people. A campaign aimed at publicly improving the actual and perceived relationships between Aboriginals and non-Aboriginals needs to be developed.

- *Concern over Perceived Quality and Authenticity of Products/Facilities:* Many tourists who visit Aboriginal tourism destinations or attractions are expecting to experience authentic "traditional" Aboriginal culture. At times they are disappointed when they witness either the modernity of Aboriginals or in other cases their poor living conditions. Furthermore, there is a concern amongst international tour operators over the authenticity of some of the products being offered. There is a need to ensure that tourists receive accurate information about the destination and its culture before their visits. They must be assured that they are experiencing authentic culture.

- *Concern over Cultural Integrity:* Some forms of tourism development can be perceived as having negative impacts upon host communities and their culture. This can create friction between Aboriginals and their guests. This, in turn, can negatively affect tourists' perception of Canadian Aboriginal tourism destinations. Guidelines and protocols concerning the forms of tourism development and activity deemed appropriate in such areas should be developed and enforced by Aboriginal communities. These guidelines should be communicated to tourists as well as local Aboriginal groups so that conflict over appropriate forms of tourism use is avoided.

Table 2.3.3 provides a summary of these image and attitude constraints and identifies proposed strategies and exemplary practices (where available) for dealing with these concerns.

Constraint/Issue: Negative Labour Force Attitudes

Description of Constraint/Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Negative labour force attitudes: tourism is often seen by the labour market as low paying with few opportunities. Some employers feel that there is low reliability and drive of employees (PWC Consulting, 2002)	· Develop an "image change" for tourism and portray as something worthwhile engaging in for Aboriginal people (Notzke, 1995). · Build the tourism ethic in communities by offering informational workshops, developing local tourism plans (including potential/existing sites, events and strategies for long-term development), establishing local Aboriginal/Métis tourism committees and a process by which these committees interact with regional/provincial tourism planners (Ron Rivard Management, 1998).	The *Dreamtime Cultural Centre* in Australia trains staff to handle a wide variety of positions and provides staff with the basic ingredients they will need to progress their career goals. Ongoing training is offered to committed unemployed indigenous people to build up their self-esteem and pride in their heritage and provide them with basic skills for future employment. The Centre has a reputation for encouraging staff development, which places the Centre in a position of demand by potential employees and provides the Centre with the opportunity to hire the "best." Staff who move elsewhere generally act as very positive ambassadors for the Centre, which serves as an economical form of advertising (Inns and Associates, 1996).

Constraint/Issue: Negative Labour Force Attitudes		
Description of Constraint/Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Image of Aboriginal peoples by non-Aboriginals and/or tourists is sometimes negative (PWC Consulting, 2002).	· Steps should be taken to improve the relationship between Aboriginals and non-Aboriginals (PWC Consulting, 2002). · A positive image and attitude toward Aboriginal peoples needs to be created (PWC Consulting, 2002). · Foster community pride and beautification initiatives to better community appearance (EGSI et al., 2002; EPGC, 2000). This is important because appearance can be a very positive or negative factor in the success of tourism (EGSI et al., 2002). · Current political and social problems should not be brought into interpretive/tourism activities (Hart et al., 1996).	
Federal signs at the entrances of reserves can deter tourists (e.g. large signs stating that people are entering a reserve and that there is "no trespass-ing" (PWC Consulting, 2002)	· Partnership with band councils and federal government to develop gateways and increase welcoming signage for reserves that host a number of tourism businesses (PWC Consulting, 2002). · Signage should make extensive use of Aboriginal design motives and artwork where appropriate (Economic Growth Solutions et al., 2002).	
Tourists can disrupt native ways of life, which can create friction and negatively affect the image of Aboriginal peoples (Inns and Associates, 1996; Hart et al., 1996)	· Create a visitor's guide to educate visitors about Natives and to help them avoid embarrassment from violating tribal policies and customs (Inns and Associates, 1996). · A "hands-on" approach allows visitors to acquire a "proper" understanding of the culture they are being exposed to (Inns and Associates, 1996). · Aboriginal hosts should have control over visitor activities (e.g. photo restrictions), and set temporal, spatial and cultural limitations for tourists (Zeppel, 1997; EPGC, 2000). · Cultural beliefs should be explained to prevent any misunderstandings (EPGC, 2000).	The *Gwaii Haanas Watchmen Program* (Queen Charlotte Islands) was created in response to concerns about vandalism of old Haida village sites. Several parties of one or two volunteers would camp at sensitive sites and protect the cultural artefacts and human remains. They also provide visitors with first-hand introduction to Haida traditions by exposing them to Haida life, sharing knowledge of the environs, as well as the stories, songs and dances associated with the sites (Hoese, 1999).

Constraint/Issue: Concern over Perceived Quality and Authenticity of Products/Facilities

Description of Constraint/ Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Lack of quality or authenticity of some “Aboriginal” products (e.g. the running of “Aboriginal tourism” by non-Aboriginals) may damage reputations in the market and can affect future business (PWC Consulting, 2002; Inns and Associates, 1996).	· Establish standards or acceptable criteria for designating a product as an Aboriginal cultural product. A constantly updated directory of such products should be created and maintained (Ron Rivard Management, 1998; Hart et al., 1996)). · Aboriginal ownership of Aboriginal-related tourism products is preferable. Products with non-Aboriginal ownership or control should have significant involvement by Aboriginal people, including in managerial and decision-making positions (Hart et al., 1996). · Create programs to educate non-Aboriginals who offer Aboriginal-related tourism products or services about the Aboriginal way of life (EGSI et al., 2002; Sadoway, 1999). · Demonstrate how misrepresenting the Aboriginal culture (e.g. by non-Aboriginal tour operators) can affect Aboriginals and tourism in general. · Guide certification standards should be implemented (EGSI et al., 2002; Hart et al., 1996). · Product ranking (rewards to outstanding tourism suppliers/ operators) can act as an incentive to develop high quality products (Inns and Associates, 1996).	The *Cultural Training in Indian Law for National Parks Interpretive Guides*, created by the United States National Parks Service, educates Parks guides about the history and lifestyles of Native American Indians. Through these efforts, the program seeks to remove stereotypes of Indian peoples and cultures and replace them with a more accurate picture of Indian history and contemporary life (WTTHRC, 1999). The *Dreamtime Cultural Centre* in Australia employs only those people of Aboriginal or Torres Strait origin. Any assistance required but not available by indigenous people is brought in on a consultancy basis and indigenous people are trained to acquire the skills of the consultant (Inns and Associates, 1996).

Constraint/Issue: Concern over Perceived Quality and Authenticity of Products/Facilities		
Description of Constraint/ Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
	· A higher degree of Aboriginal involvement in tourism (e.g. the extent to which they manage, control or directly benefit by hosting tour groups) enhances the "authentic" experiences of visitors (Zeppel, 1998). · Community-based tourism development will give Aboriginals more control over the tourism product being offered (Budke, 1999b) · Cultural experiences should not be commercialized (EPGC, 2000).	The community of *Pangnirtung* (Baffin Island) became a pilot project for community-based tourism development in the Canadian Eastern Arctic in 1981. Community involvement and control was achieved via: numerous meetings with community members and government officials to build consensus; extensive public information and education program to achieve support of the community; the formation of a local tourism committee to review tourism proposals, keep the community informed of these initiatives and organize local tourism employees and services; a market strategy designed to attract small group tours to maximize local control; and, involvement of community members in research/planning stages (Budke, 1999b).The *Anishinabe Experience*, an Aboriginal tourism operator in Ontario, not only educated visitors about the traditional ways of life, but also showed guests how they maintain their culture in their everyday lives, how they balance cultural traditions with today's modern technology (EPGC, 2000).
Portrayal of inaccurate information can negatively affect tourism (EGSI et al., 2002). For instance, tourists may be quite disappointed to see Aboriginal people in modern clothing and living in modern surroundings if they are expecting to encounter a traditional Aboriginal lifestyle (Zeppel, 1998).	· Accurate information (such as living conditions, what can be expected from a tourist destination) should be promoted (EGSI et al., 2002; Inns and Associates, 1996).	

Description of Constraint/ Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Facility conditions can significantly impact visitor satisfaction (Inns and Associates, 1996; EGSI et al., 2002)	· Existing tourism products, services and facilities need to be upgraded, involving a public/private partnership approach. Facilities should be brought up to current marketplace standards and should emphasize Aboriginal theme/design motifs (EGSI et al., 2002; Zeppel, 1997). · Develop / implement quality assurance standards, especially for accommodations and attractions. Visitors should not perceive the need for upgrades (EGSI et al., 2002; Inns and Associates, 1996).	
Many Aboriginal communities do not have the infrastructure for their own needs, let alone the needs of tourists (EGSI et al., 2002; Hart et al., 1996)	· Facilitate the development of community infrastructure for tourism. Key components, such as access and internal roads, air access facilities (for wheeled and float planes), and quality community centre facilities that can house visitor services (e.g. tourist information, interpretive features/exhibits, and, in some cases, limited overnight accommodation) (EGSI et al., 2002). · Critical mass and product diversification should be built up: internationally renowned attractions, strong, high profile marketing material and a wide range of goods and services designed to respond to virtually every need of tourists are key components in successful Aboriginal tourism products (Inns and Associates, 1996).	The *Indian Pueblo Cultural Centre* (New Mexico) consists of a main museum, children's museum, gift shop, restaurant, exhibit gallery and mini theatre for ceremonies and dances. Various marketing avenues are employed, and association with a marketing firm provides advertising and marketing support for the Centre. Partnering with local hotels and local facilities helps generate referrals to the Centre (Inns and Associates, 1996).
Length of travel time, limitations of flight scheduling and high airfares in northern areas can be a deterrent to attracting visitors (Economic Growth Solutions et al., 2002)	· Expand passenger air services to northern areas (EGSI et al., 2002).	

Constraint/Issue: Concern over Perceived Quality and Authenticity of Products/Facilities		
Description of Constraint/ Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Seasonality of tourism, especially in northern areas. Lack of established winter tourism products (EGSI et al., 2002)	· Offer shoulder- and off-season discounts and special promotions. · Offer interesting shoulder- and off-season tourism experiences. · Combine a land-based way of life with tourism (Northwest Territories) (Notzke, 1997). · Promote off-season tourism to appropriate markets (e.g. New Zealand has found that Japanese are willing to trade off winter weather for off-season prices while Germans are not) (Inns and Associates, 1996).	*The Pokiaks*, local operators for Arctic Nature Tours in Tuktoyaktuk, NWT, hunt, fish and trap during the off-season. They plan to attract “spring tourists” for the Beluga Jamboree (a festival in April) with dogsled rides and visits to the pingos, a local landform. During the summer, they offer river rafting trips, whaling and community tours (Notzke, 1997).

Constraint/Issue: Concern over Preservation of Cultural Integrity		
Description of Constraint/ Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Concern for the preservation of cultural integrity (Hart et al., 1996	· Criteria should be implemented to ensure that products respect and reflect Aboriginal values (Hart et al., 1996). · Culturally appropriate facilities/products (e.g. boardwalks and trails) should be developed (Zeppel, 1997). · Tourism facilities and visitation levels should be developed gradually so that visitors can be adequately accommodated without generating negative impacts on the community (Budke, 1999b).	

2.3.4 Partnership Constraints

In today's globalizing marketplace, partnerships and strategic alliances are often the underlying foundation that successful businesses build upon. Many Aboriginal businesses and communities have failed to develop such partnerships. This is largely due to:

- *Limited Understanding of Possible Partnerships:* Many Aboriginal (as well as non-Aboriginal) business owners and communities lack an understanding of the benefits that can be created by collaborating with others and the partnership options that are available to them. Information outlining the benefits of forming partnerships and of building strategic alliances should be communicated to Aboriginal communities throughout Canada.

- *Lack of Collaboration between Aboriginals and Non-Aboriginals:* Aboriginal and non-Aboriginal tourism businesses have generally not collaborated due to preconceptions about the benefits to be gained from such relationships. However, partnerships between these two groups should be encouraged so that tourism benefits can flow to all members of such alliances.

- *Lack of Collaboration between Aboriginal Operators/Communities:* There is often limited collaboration amongst Aboriginal operators, as well as between Aboriginal communities. Partnerships need to be formed so that tourism development and marketing efforts can be effectively combined to create a common competitive advantage in the marketplace.

- *Little Involvement in Provincial and Territorial Tourism Associations:* Some Aboriginal businesses and communities are not involved with provincial, territorial or regional tourism associations. Tourism associations should be encouraged to incorporate more Aboriginal products and services into their product portfolios and promotional campaigns. This will help to demonstrate the benefits of such collaborations to all parties involved.

Table 2.3.4 provides a summary of these partnership concerns and identifies proposed strategies and exemplary practices (where available) for dealing with them.

Table 2.3.4: Partnerships

Description of Constraint/ Issue	Strategies for Addressing Constraint/Issue	Examples of Best Practices for Addressing Constraint/Issue
Constraint/Issue: Lack of Collaboration Between Aboriginals and Non-Aboriginals		
Lack of collaboration between Aboriginal and non-Aboriginal businesses (EGSI et al., 2002)	· Expand partnerships between Aboriginal and non-Aboriginal tourism and service businesses (EGSI et al., 2002). · Provide information about networking and establishing connections to Aboriginal business owners (Saulis, 2001).	
Constraint/Issue: Lack of Collaboration Between Aboriginal Operators/Communities		
Description of Constraint/ Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Lack of collaboration between Aboriginal operators/communities (EGSI et al., 2002).	· Encourage the collaboration with tourist operations in other neighbouring communities or in other parts of the province to provide specific package tour programs (EGSI et al., 2002; Hart et al., 1996). · Foster partnerships within and among Aboriginal communities to develop and promote their sector. Operators should be encouraged to pursue complementary target markets and tailor their products to different niche markets so that direct competition is minimized and the offerings of the community are broadened (EGSI et al., 2002; EPGC, 2000). · Differences between Aboriginal communities should be emphasized and used to package tours of not just one Aboriginal culture, but several (Hart et al., 1996). · Improve communication between communities (e.g. through Internet use and the publication of regional newsletters) to allow for more effective learning (Budke, 1999b).	The *Dreamtime Cultural Centre* is a registered company that serves to educate Aboriginals and Islander people about their heritage and to share this knowledge with the world through the Centre as a premium tourist attraction. There are very few attractions operating at the level of the centre. The strategy is to work with other key attractions in the immediate areas to benefit all stakeholders. This has helped attract increasing numbers of international visitors (e.g. Centre has close affiliation with an international resort that brings in a significant number of international tourists) (Inns and Associates, 1996).

Constraint/Issue: Little Involvement in Provincial Tourism Associations		
Description of Constraint/ Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Many Aboriginal tourism operators do not belong to provincial tourism associations because they do not see themselves reflected in the mainstream associations and membership fees are sometimes cost prohibitive (Saulis, 2001; Hart et al., 1996). One study found that only 1/3 of Aboriginal operators (Southern Ontario) had developed a relationship with another association or organization to enhance their business (GKATA, 2001).	· Develop Aboriginal Tourism Associations – they are more attractive to many operators (Saulis, 2001). · Develop Aboriginal tourism in collaboration with others already in the tourism industry (e.g. Regional Tourism Associations, Aboriginal Business Canada, the Canadian Tourism Commission) so that these groups are made aware of Aboriginal tourism strategies and are encouraged to incorporate the Aboriginal perspective in their mandates and promotional materials (Ron Rivard Management, 1998; Hart et al., 1996).	
Aboriginal tourism products are generally not included in mainstream destination attractions (Ron Rivard Management, 1998)	· Some major Aboriginal tourism products/features can be mainstream destination attractions and need to be linked effectively into overall regional destination marketing activities and tie in with complementary tourism developments (EGSI et al., 2002). · Ensure a stronger presence of Aboriginal tourism in the CTC's, regions' and provinces' overall tourism marketing (EGSI et al., 2002).	
Visitor information centres and convention and business bureaus do not adequately serve operators in smaller communities and those based on reserves (Alberta) (PWC Consulting, 2002)	· Available partnership opportunities need to be marketed to operators in smaller communities/ reserves (PWC Consulting, 2002). · Actions need to be taken to increase awareness of and participation in Aboriginal tourism bodies (PWC Consulting, 2002).	

2.3.5 Funding Constraints

Many entrepreneurs require relatively significant amounts of funding to develop and sustain their tourism businesses. Aboriginal tourism entrepreneurs face two types of funding constraints:

- *Lack of Available Funding Options:* The limited funding that does exist to help Aboriginal entrepreneurs develop and maintain their business is difficult to obtain and slow in being issued. A greater range of funding options is required to meet the needs of Aboriginal tourism entrepreneurs. There is also a need to improve the processes by which business owners apply for and receive funding.
- *Limited Awareness of Potential Funding Sources:* Many Aboriginal communities and individuals are unaware of the potential funding sources available to them. They need to be fully apprised of existing funding options. They should also be assisted in developing more technically and fiscally sound business plans that support their funding needs.

Table 2.3.5 provides a summary of these funding challenges and identifies proposed strategies and exemplary practices (where available) for dealing with these concerns.

Table 2.3.5: Funding

Constraint/Issue: Lack of Available Funding for Aboriginal Tourism Entrepreneurs		
Description of Constraint/ Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Limited funding and access to capital: financing can be difficult to secure as an Aboriginal person due to potentially limited credit histories and financial resources. Furthermore, funding from Aboriginal Business Canada can be extremely slow in being issued (PWC Consulting, 2002)	· Increase the type and amount of financing opportunities available to Aboriginal businesses (PWC Consulting, 2002). · Create new partnerships to allow tourism entrepreneurs to more quickly and easily receive funding for their ventures. · Provide information to Aboriginal business owners on how to complete and fulfill government documentation requirements (Saulis, 2001).	The Kivalliq Inuit Association and the Government of the Northwest Territories have developed a new way to offer better and faster service to business entrepreneurs. The Kivalliq Partners in Development initiative is a partnership between three agencies: Sakku Investments (development corporation owned by the Kivalliq Inuit Association), the Department of Resources, Wildlife and Economic Development and Keewatin Community Futures. Partners in Development provide a range of business services, including advice on how to start up a business, information about grant options, loans and loan guarantees, equity investments, networking contacts and opportunities for research and training. The result of this partnership is that rather than contacting three agencies, entrepreneurs can visit one organization for advice, and only need to fill out one application form as opposed to three. There is a faster turnaround time for application processing. This convenience has resulted in a doubling in the number of applications. Furthermore, by combining grant monies, Partners in Development can fund larger projects than its members could individually (Indian and Northern Affairs Canada, 1997b).

Constraint/Issue: Limited Awareness of Potential Funding Sources		
Description of Constraint/ Issue	***Strategies for Addressing Constraint/Issue***	***Examples of Best Practices for Addressing Constraint/Issue***
Some lack of awareness of potential funding sources among operators (PWC Consulting, 2002)	· Promote funding options, including grants, traditional bank loans and/or sponsorship (PWC Consulting, 2002). · Educate Aboriginals about unique ways to obtain funding. · In Saskatchewan, potential funding sources can include Aboriginal Business Canada, Partnership on Water-based Economic Development, Partnership on Rural Economic Development, Community Economic Development Opportunities, Saskatchewan Opportunities Corporation, Northern Development Fund, Saskatchewan Government Growth Fund and Destination Saskatchewan Program (Hart et al., 1996). A list of similar organizations that may be able to provide funding for Aboriginal businesses should be created and made available for Aboriginal tourism entrepreneurs in each province.	The Buffalo Point First Nation obtained initial funding for their resort by leasing 100 acres of land to an investment group, who used the land for cottage development. This generated revenue for construction of a road and further development, and provided accommodations for their resort. As the resort grew, funding was obtained through a variety of sources. Grants from the Department of Indian Affairs and Northern Development, the *Special Agriculture and Rural Development Act* and the Native Economic Development Program were received. They also received loans from the Southeast Resource Development Council, the Bank of Montreal and the Royal Bank. Additionally, the First Nation was able to benefit from Section 25 of the *Unemployment Insurance Act*, which subsidizes work for people on unemployment insurance. The First Nation hired workers to help with some construction projects under this program (Indian and Northern Affairs Canada, 1997a).

3. Input from Regional Aboriginal Tourism Associations

Representatives of all of the Regional Aboriginal Tourism Associations (RATAs) were interviewed to gather their perspectives on the development of the Aboriginal tourism industry and recommendations on future expansion of the industry. At the time of these interviews (summer 2002) Saskatchewan did not actually have a RATA in place, but was in the concluding stages of establishing one and so comments were elicited from a planning committee representative. Since these interviews were conducted, the Manitoba Aboriginal Tourism Association has ceased operations. No contact was made with anyone in the Maritimes as no RATA currently exists in that area. The ten RATAs contacted were:

- Aboriginal Tourism Association of B.C.(ATBC)
- Aboriginal Tourism Association of Quebec (STAQ)
- Aboriginal Tourism Association of Southern Ontario (ATASO)
- Manitoba Aboriginal Tourism Association (MATA)
- Niitsitapi Tourism Society of Alberta (Niitsitapi)
- Northern Ontario Native Tourism Association (NONTA)
- Northwest Territories Arctic Tourism (NWTAT)
- Nunavut Tourism (Nunavut)
- Saskatchewan Aboriginal Tourism Association (Sask)
- Yukon First Nations Tourism Association (YFNTA)

The RATA representatives were contacted by telephone and asked a series of open-ended questions. They were encouraged to provide specific examples of challenges and successes to further clarify their remarks. The questions covered the following areas:

- **RATA Operations, Services and Memberships** – relating to services and initiatives, membership changes and sector representation, as well as service requests;
- **Industry Relations** – listing relationships developed, memberships held and the benefits derived from those relationships; and
- **Aboriginal Tourism Trends, Issues, Opportunities and Needs** – observations on what trends and opportunities exist, what is constraining growth, and where further services, resources and initiatives are required.

The following provides a summary of the RATA representatives' comments and concludes with a summary of key observations and recommendations arising from those remarks.

3.1 Organization Profiles - Operations, Services and Memberships

Of the ten Aboriginal tourism associations in Canada, six were established five or more years ago, and three within the last three years. The newest association (Saskatchewan) is in the final stages of being set up and, as mentioned, MATA has ceased operations. There is optimism that another organization will be created that can service the needs of the Manitoba Aboriginal tourism industry.

At this time, Prince Edward Island, Newfoundland and New Brunswick do not have an organization or planning group that is responsible for solely promoting, facilitating or developing Aboriginal tourism (**Exhibit 3.1**).

Exhibit 3.1: RATA Establishment Years

Status	New <3 years	Mature 3-5 years	Senior >5 years
RATA Name	ATASO (2000) Niitsitapi (1999) Saskatchewan (currently being established)	MATA (1998) (recently ceased operations)	STAQ (1991) Nunavut (1996) NWTAT (1995) NONTA (1987) ATBC (1996) YFNTA (1994)
Total Number	**3**	**1**	**6**
Percent	**30%**	**10%**	**60%**

The Northwest Territories Arctic Tourism (NWTAT) and Nunavut Tourism are unique in that they are the primary regional tourism organizations in their regions. They report directly to their territorial governments and serve both the Aboriginal and non-Aboriginal tourism sectors.

3.1.1. Services

The services that RATAs provide can be categorized in five service areas as detailed in **Exhibit 3.2.** RATAs provide varying degrees of services within these categories, which are often dictated by their financial resources and availability of expertise.

1. Human Resources Development and Training
2. Marketing
3. Networking and Communications
4. Product and Business Development
5. Research and Advocacy.

NONTA, however, defines their services in four categories - 1) Community Awareness; 2) Product Development; 3) Training; and, 4) Marketing. NONTA's subsidiary, Moccasin Trails Inc. (MTI), is responsible for packaging and marketing its members' products. MTI sells fishing packages out of Chicago receiving a 10% commission on all packages. NONTA's corporate structure also includes NONTA Consulting, which provides advisory and business planning services to new and expanding businesses on a fee-for-service basis. NONTA's Executive Director, Bill Rogoza, describes one way that NONTA assists new businesses: "Our objective is to expose them to international markets, such as Rendezvous Canada, to help them understand what they need to do to meet industry expectations."

NONTA is also establishing a new entity called Moccasin Trail Tours (MTT). MTT will package and promote non-consumptive products such as Aboriginal cultural experiences, attractions, teepee camps, historical sites and culturally packaged tours. MTT is awaiting federal and provincial licensing approval.

RATAs create networking opportunities between the Aboriginal tourism businesses and the tourism industry by coordinating events. They also participate in committees with mainstream tourism organizations which produce member referral opportunities. Some of the RATAs have coordinated trade shows within their region specifically promoting Aboriginal tourism products to the travel trade. Niitsitapi has participated in planning committees for special events in the region ensuring the Aboriginal tourism businesses are considered as suppliers and as participants in promotional opportunities.

Exhibit 3.2: RATA Services

Service	ATASO	Niitsitapi	Sask	MATA	STAQ	Nunavut	NWTAT	NONTA	YFNTA	ATBC
HUMAN RESOURCES DEVELOPMENT & TRAINING				X	X		X		X	
Annual conference / forum / AGM										
Training						X	X	X	X	
MARKETING										
Brochure / Membership directory		X			X				X	
Email service									X	
Event planning		X	X		X	X	X			X
Familiarization tour coordination		X			X					
Marketing	X		X		X	X	X	X	X	X
Trade show representation		X		X	X	X				
Website - listing, marketing		X		X	X				X	X
NETWORKING & COMMUNICATIONS										
Communications – newsletter	X		X	X	X		X		X	
Community outreach and information	X			X	X			X		
Member benefits and discounts						X			X	
Networking		X	X		X				X	X
Referral		X		X	X	X	X			X
Visitor services						X				
PRODUCT AND BUSINESS DEVELOPMENT										
Advisory services		X			X					
Product development	X				X	X		X	X	
RESEARCH AND ADVOCACY										
Advocacy and lobbying									X	
Criteria and guidelines - market readiness, export readiness	X			X						
Library and providing information		X		X	X					
Priority purchase of Aboriginal goods and services				X	X					
Research			X		X		X			

RATAs attend trade shows to promote their members, educate the industry and consumers on Aboriginal tourism, gather information on the marketplace and identify emerging trends and opportunities.

Many of the RATAs have attended Rendezvous Canada and regional trade shows, such as the Alberta Spring Showcase. STAQ's approach at trade shows is built on the foundation of building awareness via the trade shows then following up directly with contacts made at these events. STAQ first began building these types of connections with overseas travel agents and operators by attending international shows. Subsequently, STAQ decided to focus on consumer and travel shows in regional and North American marketplaces only. The connections STAQ built while attending the international shows have been maintained by continuing to meet with them directly.

As part of supporting the industry, some of the RATAs have set up research libraries and facilitated or advocated research projects, studies or the development of guides specific to the Aboriginal tourism industry.

3.1.2. RATA Members

Other than Nunavut and ATBC, mature RATAs are all experiencing considerable growth in membership. Nunavut membership is stable, while ATBC's membership continues to grow at a slow rate. Several RATAs reported that even though they have lost some members, new members replaced the losses.

In terms of product types offered by members, Aboriginal cultural products or 'Aboriginalized' products and outdoor adventure products focusing on soft (ecotourism or non-consumptive) products are showing increased growth (**Exhibit 3.3**).

Exhibit 3.3: Membership

RATA (Yrs in Operation)	# Members	Change	Full	Associate	Affiliate	Other	Comments
Alberta (Niitsitapi) (3 years)	40-43	Stable	$40 Members=80%	$75 *called Corporate Members=20%	Not applicable	Not applicable	• New members replace those who have not re-newed • Roughly 20 new members each year
S. Ontario (ATASO) (2 years)	22 (18-20 pending)	Decline	$100 Members=98%	$100 Members=1%	$100 Members=1%	N/a	• Membership decline associated with change in how membership was acquired – membership was first given to those that attended the first meeting, membership is now paid. • Member growth seen in First Nations and economic development officers that support or facilitate Aboriginal tourism and economic development
Saskatchewan (0 years)	Not applicable	New	New organization - no membership				· Organization is just becoming established – member structure and representation to be developed · Foresee members as - tribal councils, individual Bands and First Nations, Métis locals, individual business operators and entrepreneurs

RATA (Years in Operation)	# Members	Change	Full	Associate	Affiliate	Other	Comments
Manitoba (MATA) (4 years)	50 approx	Growth	Unable to contact				· Started with 9 members, has grown to approx 50 · Growth mainly in outdoor adventure and outfitting – these are easier to get into · Some communities building lodges · No obvious decline of participation in any sector · Organization has closed operations
BC (ATBC) (6 years)	110 approx	Decline	$40 Members= 80%	$40 Members= 20%	N/a	$0 - honorary (1 honorary member)	· More members are market ready · Wilderness and outdoor adventure and ecotourism · Number of cultural products have remained around the same
N. Ontario (NONTA) (15 years)	70	Growth	$500 Members= 44%	$150 Members= 29%	$25-Affiliated/ craft Members= 15%	Allied $150 Members= 12%	· Products have diversified – now have eco-lodges, teepee camps, cruise ships, house boat rentals · Seeing growth in cultural and outdoor adventure · Southern communities focus efforts on cultural side
Nunavut (6 years)	105-111 approx	Stable	Industry $50 Members= 100%	Not Applicable	Not Applicable	Not Applicable	· Some retention loss but replaced by new members · Supply - mostly nature based with some consumptive – stable participation · Increased interest in supply side for non-consumptive · Growing relationship with cruise ships
NWT (7 years)	275	Growth	$100 Members= 100%	Not Applicable	Not Applicable	Not Applicable	· In 1995 there were 40 members, 1996 it grew to 80 then in 2002 there were 275 · Growth in all sectors – not one sector stands out
Quebec (STAQ) (11 years)	95	Growth	Active $250 Members= 46%	$400 Members= 39%	Delegate $400 Members= 15%	Not Applica-ble	· Increased membership attributed to expansion from a regional association to province-wide
Yukon FNTA (7 years)	120	Growth	$100 Members= 52%	$0 Members= 29%	$75 Members= 19%	Not Applica-ble	· Started with approx 45/50 members, now 120 full and affiliate · Increased interest in culture and soft adventure

** Membership numbers vary from month to month as most RATAs accept members year-round*
NOTE: NWTAT and Nunavut Tourism serve both the Aboriginal and non-Aboriginal tourism sectors.

3.1.3. Services Requested by RATA Members

Inquiries received by RATAs from members encompass a wide spectrum, ranging from what are the benefits of tourism to Aboriginal communities to how the crafts industry fits within the Aboriginal tourism industry. RATA representatives commented that their members are requesting services that primarily focus on product development, including training, as well as education on business development and management. They added that members also are seeking information on the tourism industry, including such areas as standards, industry structure and product and marketing opportunities.

Several RATAs find product and/or business development assistance is a significant component of the services they provide. The learning curve for some businesses is steep, and they require assistance with business planning, access to funds, and support services for finance, management and marketing. New members joining RATAs are often seeking information on how to develop their business, as well as how to make contacts with operators and industry representatives. STAQ has responded to these needs by offering Trainee Membership to businesses in their first six months of operation; this level of membership also includes no-fee business development advisory services. NONTA takes new members to trade shows to introduce them to the travel trade.

Services that members have requested are listed in **Exhibit 3.4** below.

Exhibit 3.4: Member Service Requests

Human Resources Development & Training	
Culture	NWTAT
Entry level	NWTAT, Sask
Hospitality - customer service	ATASO, Nunavut, NWTAT
Packaging ideas	Niitsitapi
Training	ATASO, Nunavut, NWTAT
Workshops	Niitsitapi
Marketing	
Branded marketing	Sask
Internet and websites	MATA
Networking and Communications	
Contacts - tour operators interested in business	Niitsitapi
Networking opportunities	Niitsitapi
Product Development	
Business development / advisory - how to expand, market opportunities, advice on standards, market readiness	Niitsitapi, NONTA, ATASO, ATBC, Sask, Nunavut,
Business planning	ATBC, Niitsitapi, MATA, NONTA, Sask
Coordination of industry	MATA, NONTA, Sask
Funding sources - program information	Niitsitapi, MATA, NONTA, ATASO
Industry information - opportunities, structure	ATASO, Sask
Marketing - ideas on how to market	Niitsitapi, NONTA, Nunavut, NWTAT

Product Development – cont'd.	
Pricing - craftspeople	Niitsitapi
Product development	MATA, ATASO, NWTAT
Proposal development	Niitsitapi
Research and Advocacy	
Case studies - what works, doesn't	YFNTA
Detailed research	NWTAT
Exit surveys	Nunavut
Industry standards	NWTAT
Market information	ATBC, NWTAT

3.1.4. Relationships and Partnerships

RATAs enjoy relationships with many different entities within the tourism industry, both within and outside their respective regions. As outlined in **Exhibit 3.5**, relationships are commonly established with regional, territorial and federal governments, as well as with sector groups and organizations.

Exhibit 3.5: RATA Relationships and Partnerships

	Federal/ National	Provincial/ Territorial	Regional	Travel Trade	Other
Alberta (Niitsitapi)	· Aboriginal Business Canada (ABC) · Indian and Northern Affairs Canada (INAC) · Canadian Tourism Commission (CTC) · ATTC · Parks Canada · Canadian Heritage	· Alberta Economic Development - Product Development	· Tourism Calgary* · Edmonton Tourism* · Chinook Country* · Banff/Lake Louise Visitors Bureau* · Parks Banff	· Jonview · Brewster · Creative Western Adventures · JTB / Canadian Coco Tours	· Trail of the Great Bear - tour planning group · Cowboy Trail - tour planning group · David Thompson Country
S. Ontario (ATASO)	· ABC · INAC** · CTC · ATTC · Parks Canada · Canadian Heritage	· Ontario Tourism Marketing Partnerships (OTMP) · Ministry of Cultural Tourism Recreation		· Members · OTMP travel trade members/ partners	
Saskatchewan (Partnerships under Development)	· CTC**	· Federated Saskatchewan Indian Nations · Tourism Saskatchewan		· Hotel Assn · Country Vacation · Ecotourism Society · Food Service Restaurant Assn	· Business communities
Manitoba (MATA) (organization has ceased operations)	· ABC · INAC · CTC · ATTC · Parks Canada · Canadian Heritage				· Suppliers - hotels, airlines (mostly mainstream) · Rural forums

	Federal/ National	Provincial/ Territorial	Regional	Travel Trade	Other
BC (ATBC)	• ABC • INAC • CTC • ATTC	· Tourism BC · Council of Tourism Associations*	· Ocean Blue · Grant Thornton Destinations · Tourism Vancouver* · Whistler Tourism		· Other RATA · Northcoast Regional Lands Resources Municipal Planning
N. Ontario (NONTA)	• ABC • INAC • CTC • ATTC • Federal Economic Dev. Initiative for Northern Ontario (FedNOR)	· Ontario Tourism Marketing Partnerships · Ontario Ministry of Tourism · Northern Ontario Heritage Fund		· Tour operators · Local chamber*	
Nunavut	• ABC • INAC • CTC • ATTC • Dept of Foreign Affairs and International • Trade (DFAIT) Parks Canada	• Nunavut Tunngavik Inc. • Canada North • NWT Government • Yukon Government	• Regional Inuit organizations • Iqaluit Tourism Business Association	• Arctic Environment	· Hamlets / communities · World Wildlife Fund
NWTAT	• ATTC • CTC • Tourism Industry Association of Canada (TIAC)* • Team Canada • Canadian Tourism Human Resource Council (CTHRC)	• NWT Chamber of Commerce* • NWT Government • NWT Education, Culture and Employment • NWT Tourism Industry Association*	• Business Development Centres • Canada's North Tourism Partnership (Yukon, Nunavut, NWT)	• National Tour Association* • America Bus Association* • Ontario Motorcoach Assn*	
Quebec (STAQ)	• ATTC • CTC • ABC • INAC	• UQAM • Tourisme Québec • Aventure Ecotourisme Québec	· 2 Innu Nations · 9 First Nations	• Aviation Québec Labrador • Federation of Québec Outfitters • Pash Travel • Société des établissements de plein air du Québec • Voyages Inter Nations • Tours Innu trade partners	· Mission Capital Native Benefits Plan · Canadian Executive Service Organization · Native Commercial Credit Corporation

	Federal/ National	Provincial/ Territorial	Regional	Travel Trade	Other
Yukon FNTA	• ATTC • CTC • CTHRC • ABC • Parks Canada • Canadian Heritage	• NWT Arctic Tourism • Nunavut • Alaska - chamber of commerce, tourism industry assn • Northern Travel Learning Product Club • Yukon Government • Yukon Business Tourism & Culture • Yukon Tourism Industry Association • Yukon Tourism Education Council • Yukon Trade and Investment	• Northern BC • Alaska Highway Tourism Association • Yukon College • All Yukon First Nations Development Corporations	• Yukon Wilderness Tourism Assn • Other tourism business partners • BC Yukon Hotel Association	• Aboriginal Tourism Assns • Alaska Aboriginal owned tourism businesses • Alaska village initiatives

*Holds membership in RATA
**Partnership under development

The benefits received by the RATAs from these partnerships are:

- funding;
- tourism strategy development;
- human resources training / planning;
- regional planning;
- event planning and coordination;
- Aboriginal cultural presence / education - protocol, ceremonies;
- familiarization tours (fam tours);
- information exchange;
- cooperative advertising;
- trade show attendance;
- referral for packaging and purchase; and
- discounts on services and supplies.

Typically, federal partners include Aboriginal Business Canada (ABC) and Indian and Northern Affairs Canada (INAC), which provide funding for operations and projects. Meanwhile, provincial and territorial governments are secondary partner sources contributing to operating and project costs. The two northern RATAs – Nunavut and NWTAT (which are the primary marketing entities for their regions) – are exceptions. Their territorial governments provide the majority of their funds.

For many RATAs, their respective provincial governments have been unable to provide operating funds, but have instead supported these organizations by financing activities that could be defined as projects. In these situations, there is no long-term commitment to support the RATA – rather, funding approval is required annually. This leaves the RATAs in the position of devoting valuable staff time to seeking, sourcing and piecing together funding programs, and preparing the associated reports for multiple financial contributors.

Partnerships have helped to create tourism infrastructure and provide training and business planning support through the joint development of strategies. Visitor centres and cultural programs developed in Nunavut are examples of how partnerships can be used to fulfill needs other than funding. Saskatchewan's emerging Aboriginal Tourism Association anticipates a partnership with the economic development branch of the Federation of Saskatchewan Indian Nations (FSIN), which will provide needed advisory and planning services.

Memberships in provincial and regional tourism associations and with the travel trade have also proven to be useful for RATAs. Through these associations, RATAs have identified methods by which their members can be profiled as suppliers, included for packaging in tours, and included in familiarization (fam) tours. The RATAs have also become involved in regional and event planning, ensuring that their members are considered as suppliers and that cultural components are included and delivered in a culturally respectful manner. Niitsitapi's representative remarked, "These memberships pay for themselves through the leads they generate for our members. The Springtime in the Rockies trade show is a good example - the organizers pay for rooms, park passes, and do not charge for tables. Attending trade shows, such as Spotlight at Germany's ITB also generated leads." As well, Niitsitapi has worked with Travel Alberta in planning events to ensure the Aboriginal tourism products and cultures were included.

RATAs are even involved in lobbying and regional planning initiatives. For example, the NWTAT, Nunavut and Yukon RATAs have been working together to devise strategies on economic development and air transportation. ATBC is connecting with the Oceans Blue Foundation to develop regional tourism plans for BC's north coast, including identifying resource management and training needs and resources.

RATA members can also benefit directly from partnerships with others in the industry. Members of the Yukon First Nations Tourism Association (YFNTA) and Manitoba Aboriginal Tourism Association (MATA) receive discounts on hotels, car rentals and advertising. Some of the RATAs have membership exchanges with other RATAs resulting in the same discount benefits being extended to the partnering RATA members.

RATAs also partner with the Canadian Tourism Commission (CTC). Attending shows or participating in the coordination of fam tours is one way NONTA is working with the CTC. They also jointly planned the opening of a museum in Switzerland.

3.1.5. Industry and Consumer Inquiries

"I'm coming to your province/territory, what kind of Aboriginal experiences can I have? Or, I'm looking for Aboriginal products to build into my tours, what is there? These are common questions we hear from tour operators, fam tour coordinators and tourists," said Jan Porter of the Aboriginal Tourism Association of Southern Ontario (ATASO). Other RATAs echoed similar requests.

Many of those inquiring, whether they be travel trade representatives or consumers, are seeking cultural experiences and products. Emails Niitsitapi receives from residents in the UK, Germany, United States and Alberta read, "What Aboriginal cultural experiences are available?" The Niitsitapi representative added, "Then we try to qualify what the person is seeking - for example, teepee camps, tours or other offerings. Sometimes they ask if they can stay on a reserve in traditional or contemporary accommodations."

Inquiries received by RATAs for Aboriginal cultural experiences continue to grow. As more people become aware of the Aboriginal tourism associations, the requests for information and contacts increase. Tour operators and agents are especially interested. Nunavut's CEO Maureen Bungaard said, "There are various requests from the travel trade looking for cultural products to build into their packages."

As the interest in Aboriginal culture grows and the awareness of the existence of RATAs increases, the strain on RATA staff and board members intensifies. The ATBC representative said, "It's difficult for us to reply to all the inquiries with so few resources. More regional contacts throughout the province would enable us to better respond."

ATASO plans to address the high level of inquiries by utilizing the seven regions of ATASO, "We're trying to set up a local 'receptive' in each of the seven regions."

The MATA representative reported, "People come to the community and want to take things back. There isn't enough quantity or quality of materials. MATA helps out by assisting with the coordination of artists, and by accessing and sourcing materials and supplies."

Exhibit 3.6: Industry and Consumer Inquiries

Inquiry	ATASO	Niitsitapi	Sask		STAQ	Nunavut	NWTAT	NONTA	YFNTA	ATBC
Arts and crafts - producers, retail outlets		X					X		X	
Teepee camps		X		X						
Drum and dance groups		X								
Tours		X								
Traditional accommodations		X			X				X	
Contemporary accommodations - on reserve / in community		X			X				X	
Cultural events – Pow wows, feasts, festivals, art shows		X					X		X	
General information - protocol questions (i.e., photos, attendance), expectations	X	X			X				X	
Location of products and offerings	X				X	X		X		X
Website / telephone		X						X		
Quality products for tour packaging / partnering opportunities		X			X	X		X	X	X
Fishing						X	X	X		
Authentic cultural - interpretation					X	X	X			
Hunting (cultural vs trophy)							X			
Outdoor adventure - dog team riding							X			
Cultural camps					X				X	
Aboriginal cultural guides / interpreters - employees									X	
Cultural centre									X	
Directory / tourism guide									X	
Resort, lodge - destination - with cultural experience			X							
Packages - all durations, sizes, packages			X		X				X	

** Although Saskatchewan's RATA was not yet operational, the Provincial main stream tourism organisation receives numerous inquiries and the Sask representative shared about the nature of the inquiries for Aboriginal product*

In many cases, when the RATAs receive inquiries for products they refer the inquirer directly to the business offering that type of product. MATA, however, directed the inquiry to an appropriate First Nation organization, which in turn referred the inquirer to the appropriate business. MATA felt that “Most inquiries are from people who want to know about events - they want to connect directly with the Aboriginal community.”

The travel trade and other operators are also making contact with RATAs when they are seeking to hire or contract Aboriginal people as interpretive guides or other employees. YFNTA said, “People want to hire First Nation people who can share their culture, speak their traditional language, and other languages too, for example, German.”

In Quebec, STAQ reported that most of their inquiries are from European travellers seeking to experience the “true” Aboriginal way of life. Tourists and the travel trade are looking for ways to go into Aboriginal communities, to be with the Tribe and learn about the culture, including flora and fauna interpretation.

Northern destinations get requests for cultural experiences that last more than one day.

Tourism Saskatchewan, which is working with the committee to set up the Saskatchewan Aboriginal Tourism Association, advises that packages should be developed that meet the interests of visitors and reputation of the province’s northern region. “Saskatchewan is known as a short-term destination, it is not a major gateway. There are no in-depth packages at this point.”

The RATAs have been trying to redirect telephone and email inquiries to their members by utilizing other tools. Websites help by providing background information on package offerings, member descriptions and contact information, Aboriginal cultural information, illustrations and maps, and links to Aboriginal businesses and organizations. Printed regional directories perform similar functions.

In northern Ontario, inquiries are prequalified by NONTA and Moccasin Trail Tours, which helps to ensure that clients are connected to appropriate member businesses more quickly. NONTA’s requests arrive primarily through email while Moccasin Trail Tours receives through their toll-free telephone number, website, fax and email.

3.1.6. Trends

As discussed above, more and more people are calling RATAs asking for research, contacts and assistance to develop their plans, seeking funding programs and information on the markets.

Aboriginal communities are seeking information and knowledge on the industry. Many of the RATA representatives said they believe there is a growing awareness of the benefits that tourism provides to creating readily accessible employment, entrepreneurial opportunities, and understanding of Aboriginal people leading to the preservation of cultures and languages. This view was especially evident among those RATAs which had experienced an increase in the number of requests from Aboriginal communities for informational sessions on tourism. RATAs have been asked to provide background information or references to help communities develop their strategies or businesses. To help the Aboriginal communities realize the opportunities and understand the tourism industry structure, RATAs such as STAQ and Niitsitapi deliver tourism industry workshops that cover tourism industry structure, opportunities and benefits. MATA also offered these sessions.

RATA representatives reported growing interest from the travel trade and tourists for:

- Pow wows, festivals and events;
- outdoor adventure – soft with cultural interpretation;
- traditional accommodations;
- experiences located in Aboriginal communities;
- learning experiences involving food, arts and crafts, story, language and history; and
- general and protocol information on Aboriginal culture.

Schools and museums have also requested information from the RATAs. They seek educational materials, but more often, cultural education experiences for groups of students. In Alberta, Aboriginal tourism brochures and directories have been included in teachers' educational kits. MATA found that many educators wanted to spend time experiencing life in teepees; MATA felt that people saw the Aboriginal cultural experiences as "educational."

3.1.7. Issues and Constraints

The issues constraining greater Aboriginal participation in tourism emanate from within the Aboriginal tourism industry, communities and individual businesses, as well as the RATAs.

Both Aboriginal communities and provincial / territorial governments frequently express support for Aboriginal participation in tourism, however the RATA representatives point out that concrete support is frequently not forthcoming. They indicate that federal, provincial/territorial governments, as well as Aboriginal governments and organizations generally have not ensured the resources and climate necessary to support individual or community participation. Commonly, Aboriginal politicians tend to focus on governance and treaty matters, with some expressing fear that sharing Aboriginal culture will result in 'selling out' or losing the culture. Some RATAs remarked that while the opportunities exist, individuals interested in pursuing these opportunities might be discouraged from starting a business due to the competitive nature and seasonality of the industry, or the communities' political environment.

Several RATAs expressed the opinion that those responsible for funding programs do not understand the industry. The lack of knowledge of how the industry contributes to economic development limits Aboriginal tourism participation and industry growth. To begin with, in those cases where tourism businesses or sector characteristics do not create full-time or 'acceptable' levels of profitability, funding support is not available. For example, festivals and events are short-term in nature and provide only temporary employment and market opportunities for other business and retail sectors. Normally, festivals and events would not qualify for Aboriginal Business Canada funding, yet this sector is important to the industry and Aboriginal cultures. This sector provides marketplaces for artisans and craftspeople, promotes greater Aboriginal cultural awareness, and enhances tourism offerings in the area by adding Aboriginal cultural activities. Museums and interpretive sites are other important contributors to building the industry, yet they are consistently dependent on outside contributions for operating funds, again disqualifying them from Aboriginal business funding programs.

The long processing time for the approval of funding applications by various support agencies has also obstructed Aboriginal participation in tourism. The industry's cycle requires businesses to set prices and develop promotional materials roughly 1.5 years in advance of the tourism operating season. Due to delays in funding approvals, Aboriginal tourism businesses have missed key deadlines in the cycle, resulting in them losing out on the full tourism season. These delays also can result in increased planning, operating and marketing costs, which sets the businesses up for failure even before they begin operations.

Programs like those offered by Aboriginal Business Canada require applicants to demonstrate significant economic benefits, often assessed in terms of year-round operations and full-time or permanent employment creation. The characteristics of the industry do not fit these requirements and in turn it has been difficult for some applicants to get the financial resources, advisory services and community support needed to get started. In northern Canada, the peak tourism season may only be two months, requiring business owners to have alternate employment for the balance of the year.

The funding challenges faced by RATAs have made it difficult for them to fulfill all the requests received for support and referrals. Operating funds available to RATAs have been modest, disabling them from creating the physical and human capacity needed to service the demand. NWTAT, Nunavut and STAQ have the largest operating budgets of the ten RATAs. NWTAT and Nunavut budgets are larger because they are the primary tourism service providers and marketing organizations for their territories and therefore receive operating funds from their territorial governments. STAQ's budget increased to over $1 million when its application to the Canadian Tourism Commission (CTC) Product Club program was accepted in 2000. Other RATAs receive operating funds from Aboriginal Business Canada (ABC) and, as a requirement of ABC, must match those funds from alternative sources. Often the matching funds are sourced from provincial or territorial governments identified as either 'operating funds', but more often as 'project funds' since many of these governments are restricted from providing operating dollars.

The RATAs believe that Aboriginal business environmental operating factors have contributed to the slow growth of the Aboriginal tourism industry. These factors include businesses being inconsistent with delivery and operating hours, having poor hospitality and management practices, and not having the proper operating tools or marketing materials.

The physical environment of many Aboriginal communities is also believed to constrain Aboriginal tourism. Visitors require well-maintained communities that are visually appealing, safe, have good transportation access (i.e. roads, planes, boats), and business services such as health, police and financial. These infrastructure prerequisites are absent in many communities.

In summary, the credibility of the Aboriginal tourism industry is harmed by the poor reputation of individuals and communities, which causes the travel trade and tourists to be reluctant to consider Aboriginal tourism businesses. This situation is exacerbated by the mainstream tourism industry's lack of understanding and knowledge of the unique characteristics of Aboriginal cultural values, beliefs, protocols and people, and the challenges and benefits of Aboriginal community development. RATA representatives suggest they can play a key role in bringing these issues to the forefront and helping organizations like the Department of Canadian Heritage and Parks Canada understand the operating environment.

3.1.8. Emerging Opportunities

The inquiries received from the travel operators and visitors together with what they have learned through their involvement with industry organizations lead the RATAs to believe emerging opportunities for Aboriginal tourism exist in the following areas:

- products that fulfill the interests and physical needs of seniors markets;
- soft adventure;
- cuisine tourism (foods) – restaurants and packaging;
- arts and crafts – demonstrations as a package or tour, and retailing;
- guided / interpretive experiences for educational purposes as business offerings or as guides with non-Aboriginal operators;
- festivals and events;
- development of interpretive experiences at culturally significant sites off-reserve (i.e. parks, heritage sites); and
- experiences that can be incorporated into existing non-Aboriginal tour operator packages or businesses.

3.1.9. Capacity Building

In order to fully capitalize on the many available opportunities, Aboriginal people and their communities must build their tourism capacity. Individuals and existing Aboriginal tourism operators need to develop stronger networking skills, learning how to communicate with other operators, build contacts and follow up with leads. As well, they must learn how to select events to participate in and how to capitalize on the benefits of membership in associations.

RATA representatives reported that if Aboriginal tourism operators better understood industry standards, more Aboriginal tourism businesses would realize success. These businesses would be more likely to be included in tour packages and attract a greater number of visitors as a result of stronger, more compatible marketing and operating practices.

Those who are tasked with supporting Aboriginal tourism also require improved knowledge of the Aboriginal tourism, business and development environment. Agencies funding Aboriginal tourism businesses need to understand the cyclical nature and structure of tourism, while the tourism industry requires knowledge of Aboriginal culture, protocol, development processes, and governance and decision-making structures.
The tourism hospitality skills of Aboriginal front-line workers, interpreters and guides are inconsistent with industry standards and expectations. Furthermore, while there are industry expectations related to hospitality, the Aboriginal community adds their own expectations related to Aboriginal protocol. Both Aboriginal and non-Aboriginal people working in the tourism industry need to understand both standards and requirements associated with tourism hospitality and Aboriginal protocol. Training for guides and front-line staff, as well as managers, is needed.

3.2 Observations

The level of services the organizations are able to offer varies from one RATA region to another. Most RATAs that are five years or older can be considered successful and provide a fairly comprehensive array of services. They have developed relationships with organizations, nationally and locally, which have compatible interests.

While all RATAs reported there was a need to support product and community development, only STAQ, NONTA, NWTAT and Nunavut have created the means to do so through their organizations. NONTA developed NONTA Consulting, while STAQ, NWTAT and Nunavut fulfill these functions by adding staff that are dedicated to delivering this service. YFNTA and Niitsitapi have endeavoured to respond by providing these services with existing staff, however, Niitsitapi being a relatively new entity with limited resources has found it challenging to do so. MATA fulfilled the need to provide advisory services for business planning and community development through a partnership with CESO.

The majority of RATAs have 50 to 75 members. While membership fees do provide a portion of operating budgets, the membership fees that RATAs charge are low in comparison to their non-Aboriginal counterparts. ATBC charges $40 for either a Full or Associate member, while ATASO at its inception did not charge a fee (although it has since introduced membership fees). YFNTA’s full member rate is $100, with Affiliate and Associated membership being $75. Both STAQ and NONTA provide a wide range of services to their members, with fees ranging from $150 to $500 depending on the level of membership. These rates are low compared to mainstream tourism associations. For the RATAs to increase their membership fees, two elements must exist. First, the Aboriginal tourism businesses must be able to afford the fee. Second, the RATAs must be able to

provide services and benefits commensurate to the fee charged.
The awareness of the existence of Aboriginal tourism associations and the growing interest in Aboriginal cultural tourism experiences is an encouraging sign. More Aboriginal communities have become aware of both of these developments, and consequently are exploring opportunities and building tourism into their community economic development strategies. At the same time, more Aboriginal people are starting tourism businesses.
In terms of product, RATA representatives reported that the greatest interest is for cultural experiences, especially on reserve or in an Aboriginal community. Areas known for their outstanding natural environment are receiving more requests for cultural experiences. Festivals and events are also being asked about more.

Travel operators are inquiring about cultural products that they can build into existing or new packages. This means that the Aboriginal experiences or products are more likely to be purchased if they have a cultural component and the duration is short.

It is not possible for the Aboriginal tourism industry in Canada to develop at the same pace in every region. The awareness levels of tourism and the potential product development opportunities vary. Further, communities' ability to capitalize on tourism varies depending on the attractiveness of the particular region to visitors. In some areas, Aboriginal tourism is well developed with the Aboriginal cultural experience being the main tourism offering (i.e., northern Canada and remote or isolated areas). In other areas, however, awareness and understanding of Aboriginal tourism possibilities are minimal, and Aboriginal tourism is not strongly considered in community economic development or regional tourism plans.
The major challenges that RATAs face are attributed to the lack of resources (financial and human) to respond to industry demands. Uncertainty related to funding has impaired the ability of RATAs to focus on the needs of their members and build the industry. One RATA representative commented that it is difficult to develop long-term plans when you are not certain that your organization will continue to operate.

3.3 Recommendations

Efforts and services of the Regional Aboriginal Tourism Associations have contributed to raising the awareness and growth of Aboriginal tourism and to assisting communities and individuals with entering the industry. RATAs have performed the important role of linking the tourism industry with the Aboriginal community and businesses, as well as facilitating greater awareness of Aboriginal culture and tourism. While the initiatives to date have produced results, the Aboriginal tourism industry continues to struggle with realizing its full potential and capitalizing on emerging opportunities. The following are recommendations on how the RATAs and their associates could reduce the challenges that hinder industry growth and participation, and promote the consistent, high-quality, respectable growth of Aboriginal tourism across Canada .

Services
The services that RATAs provide vary. In order for the Aboriginal tourism industry and the products to develop at a more consistent pace, RATA service offerings should be standardized and common information on industry standards and product development made available.

Funding

Funding support varies from region to region. While most if not all RATAs receive operating funds from Aboriginal Business Canada (ABC), the program requires matching funds. The expectation is that these funds will be provided by a provincial or territorial source; however, the organizations that might provide matching funds often are unable to provide such funds. These organizations may be restricted from providing financial support or may be unable to provide the monies for other reasons. This situation creates much uncertainty. For example, Niitsitapi in Alberta is uncertain whether it will have the funds to continue to operate after the 2002 fiscal year. To address this common problem, it is recommended that ABC consider in-kind as well as cash contributions for core funding matching requirements.

It is also recommended that discussions take place between ABC and provincial / territorial governments to develop a coordinated approach to providing financial and other resources to Aboriginal tourism associations. Annual operating funds should be committed for at least five years with measurable, consistent benchmarks and accountability criteria. The level of funding must be adequate, at a minimum, to allow each RATA to have at least three full-time, well-qualified permanent employees in the following areas: executive director/ manager, marketing and/or project officer, and operating/administrative support.

In addition, remuneration provided must be sufficient to attract and/or retain experienced senior management. Initial funds should be provided to RATAs at the beginning of a reporting period with subsequent funds being approved when the RATA has accounted for the funds received. Other federal government programs have operated in this way, therefore such a system should be possible. An annual budget of at least $250,000 for administration and operations was recommended by several RATAs. Funds should also be sufficient to support the following projects:

- trade show attendance at regional (i.e. provincial/territorial, multi-region) and some short-haul market events;
- a regional Aboriginal tourism directory/guide;
- membership to travel trade organizations and regional/provincial non-Aboriginal organizations;
- ongoing maintenance and regular updates of website information;
- community outreach sessions on community tourism planning and industry opportunities; and
- a regional annual conference/forum providing information on industry trends and product development and marketing.

- **Regional Publications –** In regard to a product directory or guide, regional publications should be developed which contain information on all available products. In addition, a national “Export Ready Aboriginal tourism guide” featuring products that satisfy industry-accepted export criteria should be produced in different language versions (i.e. English, French, German, Italian, Japanese). This national guide would reduce design, production and distribution costs, as well as helping to build a national image and ensuring all Aboriginal tourism products in Canada are assessed under industry-recognized criteria.

- **National Standards –** National standards for product quality should be developed. Outside of Canada, Aboriginal tourism products are considered to be one homogeneous group; that is, individual Aboriginal cultures are not recognized. International marketplaces do not understand how First Nations, Inuit and Métis cultures differ; therefore, the basic product quality levels must be consistent since each product is seen to represent all Aboriginal tourism products and cultures, not the individual business or the nation from which the product originates.

- **Website Consistency –** All regional Aboriginal tourism associations have websites. Websites are useful tools for helping to prequalify, direct or filter inquiries, thereby reducing the demand on RATAs' resources. Information and navigation of these websites currently varies. Again, content consistency will help the travel trade and visitors find the information they're seeking. Useful website pages for all RATAs to consider incorporating into their sites are listed in the table below.

Exhibit 3.7: Website Page Recommendations

1. Aboriginal tourism products - contact information, description, hyperlinks, maps, Aboriginal origin.
2. First Nation, Inuit, Métis cultural information and protocol.
3. Festivals and events.
4. Tour packages.
5. RATA Member Information
   a) Member program - services and benefits, fees, voting structure
   b) RATA background information - board, history
   c) Special events
   d) Success stories, case studies, best practices
   e) Newsletters
   f) Industry Resources - studies, reports
   g) Training programs.
6. Product Development
   a) Funding sources (possibly provided through links to the organizations)
   b) Cultural tourism
      Criteria - market-ready/export-ready industry standards.

Promoting Aboriginal Involvement

ATTC should develop a national tourism awareness campaign targeting Aboriginal communities, including political leaders, economic developers, youth and Elders, on the opportunities in tourism. Youth should be made aware of the career and entrepreneurship possibilities by exposing them to cultural experiences, industry standards and hospitality expectations. Communities should be encouraged to build tourism into their plans by ensuring the physical environment (i.e., community aesthetics and infrastructure) is suitable and that human resource and training plans provide for the development of skills required to enter the industry.

Developing an International Presence

Many of the available Aboriginal tourism experiences are at different stages of market readiness or are attractive to different demographic and geographic markets. Those products that are targeting international markets and are export ready should be promoted through a "Canada Aboriginal Pavilion" at international travel trade and consumer shows. It was recommended that ATTC be responsible for coordinating this, while regional Aboriginal tourism associations could promote the market-ready products to domestic (local and regional and North American travel trade and consumer) markets.

ATTC Advocacy of Industry Growth

On matters of common interest, RATAs rely on ATTC to advocate their initiatives including challenging governments to support RATA operations and other major operations. RATAs require a united front, and expect that ATTC will perform the role of presenting this to federal and national forums.

4. Key Informant Input

Select key informants were interviewed as part of the study process. Key informants contacted included representatives of Aboriginal Tourism Team Canada, the Canadian Tourism Commission, Parks Canada and the ex-Chair of the former Canadian National Aboriginal Tourism Association (CNATA), the predecessor to ATTC. The interviews focused on obtaining insight into emerging trends, issues constraining the industry, product and market development opportunities, and strategies required to deal with the issues and take advantage of the trends and opportunities.

4.1 Emerging Trends

The key informants indicated that the following trends are having an impact on the development of Aboriginal tourism in Canada:

- **Aging population** – this trend is driving many of the other trends, such as increased demand for experiential and learning tourism, cultural tourism, ecotourism and soft adventure.
- **Cultural tourism** – one effect of globalization is more interest in other cultures and lifestyles, including their cuisine and fashions. Further, there is more concern about impact of travellers on local cultures.
- **Nature-based tourism** – more interest in learning about and experiencing the natural world and more awareness and more concern about protecting and conserving the environment.
- **Soft adventure -** increased demand for low-risk activity vacations, such as birdwatching, hiking and canoeing, that take place in a natural setting.
- **Experiential and learning tourism** – trend towards history, culture and nature vacation experiences that involve participation and learning by the traveller, resulting in greater personal enrichment.
- **Authenticity –** more discerning travellers are demanding authentic tourism experiences and rejecting commercial facsimiles.
- **Multifaceted experiences** – travellers desire vacations that combine a variety of mainstream and special interest tourism experiences.
- **Short experiences –** both lack of time and the desire to participate in diverse vacation experiences are influencing the demand for short duration special interest experiences.
- **Mainstreaming of special interest tourism** – niche market appeal of culture-, nature-, learning-based special interest tourism types broadening to capture interest of much more diverse demographic segments.
- **Aboriginal baby boom** – creating a potential pool of tourism industry labour required to develop tourism businesses in First Nations communities.
- **Events of 9/11** – increased travel costs, safety concerns and other lingering effects of 9/11 have resulted in decreased international travel and tourism sector uncertainty.

4.2 Issues and Constraints

The key informants suggested that the following issues are constraining the development of the Aboriginal tourism sector:

- **Social issues –** tourism often must compete with more basic social priorities, such as sewage, water and housing.
- **Land issues –** key land-related issues include unsettled land claims and the associated uncertainty, access to resources issues, and negative stereotypes surrounding land conflicts. These have the effect of making tourists reluctant to enter into some areas.
- **Tourism awareness –** lack of understanding within Aboriginal communities of tourism development opportunities and of market expectations and needs. Further, cultural tourism is seen by many to be a cultural “sell-out.” On the consumer side, lack of awareness and understanding of Aboriginal communities can lead to unrealistic product and service expectations.
- **Industry immaturity** – industry is fragmented and levels of development of communities involved in tourism development, micro-businesses that comprise industry and the Aboriginal tourism associations that are striving to assist with industry development all vary greatly. This creates many problems, including inadequate communication between and among communities and RATAs, lack of understanding of industry overall, inappropriate product development, ineffective market development, and consistency and reliability issues.
- **Management capacity –** business planning and management skills are generally lacking among Aboriginal tourism operators. This is compounded by the lack of capacity among economic development officers to guide tourism development, and the general lack of business management support assistance.
- **Education and training** – significant education and training required to develop tourism capacity and professionalism not being accessed due to funding, cultural and geographic constraints.
- **Financial** – difficult to access dollars for capital projects and for product and market development due to limited finance pools and difficult funding and financing approval processes.
- **Industry marketing –** Aboriginal and non-Aboriginal destination management organizations are ineffective in communicating sector information, such as existence of market-ready product, to domestic and international tourism industry.
- **Partnerships –** reluctance to partner with non-Aboriginal associations and operations for packaging and marketing purposes.

4.3 Opportunities

The key informants identified the following as the best development opportunities for the Aboriginal tourism sector:

- **Special-interest tourism** – cultural tourism should be layered onto other types of special-interest tourism experiences currently enjoying increasing market demand. Specifically, authentic cultural tourism experiences should be layered onto experiential and learning tourism and ecotourism product offerings. Opportunities also exist to develop Aboriginal learning tourism products.
- **Non-capital intensive products and services** – given that obtaining access to capital financing is challenging, there should be more attention given to developing non-capital intensive products and services. For example, cultural interpretation programs or Aboriginal cuisine catering services could be provided to other tourism operations.
- **On-the-beaten-track products and services** – cater to mainstream market by developing more urban-based cultural events and attractions, and by locating products and services near to large cities, national parks and major routes.
- **Accommodation and hospitality facilities** – Aboriginal-theme accommodation and food and beverage facilities are popular, and niche market opportunities exist including Aboriginal-theme restaurants and wellness spas. Other niche market opportunities are accommodation and meeting facilities targeted to the Aboriginal travel market, which would include travel for political, business and educational purposes.
- **National Parks and Historic Sites –** opportunities associated with National Parks and National Historic Sites include partnering with Parks Canada to provide interpretation and education programs, concessions within parks (e.g., canoeing, food services, retail services, tours), and complementary services that take place outside park boundaries but which are tied to Parks programs.

4.4 Strategies

The key informants were asked to provide input on strategies that can assist the Aboriginal tourism sector to overcome the issues facing the industry and to take advantage of tourism trends and opportunities for development. Key strategic directions and initiatives suggested by the key informants fell into four key categories:

- **Tourism awareness** – the community awareness programs that are being delivered by some of the RATAs must be made available to any community which has a demonstrated interest in tourism so that communities can fully understand the importance, benefits and drawbacks of tourism and what it takes to be successful in tourism.

- **Strengthen RATAs** – it is clear that Aboriginal tourism development is generally more successful in regions where strong RATAs exist, such as Northern Ontario and Quebec. For example, these regions show significantly more coordination and effectiveness in product development and marketing. Consequently, institutional strengthening of the RATAs is seen to be critical to developing the Aboriginal tourism sector. Assistance should be provided to strengthen the capacity of the RATAs to develop their leadership role and their responsiveness to the Aboriginal tourism sector. In order both to lessen the RATAs' dependency on government funding and to expand the resources available to the associations, the funding plan should include the development of a strategy to broaden the revenue base to include private sources of funding.

- **Industry development** – product development, human resource development and market development strategies are required to help to ensure that available resources are effectively utilized and that the industry develops more rapidly and in a coordinated fashion. Ideally, a comprehensive national industry development strategy should be developed. This national strategy would be supported by complementary provincial/ territorial strategies. Key initiatives that should be included are strategies to develop training and funding programs that are appropriate for developing market-ready product and business skills, and mentorship and coaching initiatives.

- **Industry promotion –** increased distribution of product information to travel trade by national and provincial destination management organizations, including RATAs. The development of sales tools should include databases of photos, brochures, product summaries and other product materials. An Internet site providing comprehensive product and destination information for consumers and the travel trade is recommended.

5. Capacity and Readiness Indicators Survey

Encouraging tourism product development by Aboriginal communities and private sector operators requires that the communities/operators have the capacity to accommodate tourism consistent with market needs and expectations. Otherwise the individual community/operator is put at risk in terms of the potential for viable and sustainable products. In order to assist in determining which capacity and readiness indicators are important to Aboriginal tourism development, surveys were carried out with select Aboriginal Business Canada (ABC) representatives, Indian and Northern Affairs Canada (INAC) representatives and economic development officers (EDOs) experienced in working with Aboriginal communities and private sector operators engaged in tourism. Twenty surveys were carried out in total, involving eight ABC, four INAC and eight EDO representatives. These individuals were identified by ATTC and were chosen based on their experience in the Aboriginal tourism sector and regional representation considerations.

The consultant team first developed a list of capacity and readiness indicators thought to be key to the development of the Aboriginal tourism sector. These indicators were grouped into five categories: community commitment, culture, human resources, product and market development and technology. Next, the ABC, INAC and EDO representatives were asked, based on their experience, to consider and form responses on the capacity and readiness indicators as follows:

- **Importance of indicator** – rank the indicator as being of high importance, medium importance or low/no importance in terms of the success of Aboriginal tourism initiatives.
- **Presence of indicator** – in relation to the communities and businesses in the particular region where the representative is involved with tourism development, rank the indicator as being currently developed to a high degree, a medium degree or a low/no degree.
- **Strategies for improvement** – if the indicators in a particular category are not adequately present within the Aboriginal tourism sector, indicate what strategies/steps can be taken by Aboriginal Tourism Team Canada and the Regional Aboriginal Tourism Associations that will help to address the situation.

It should be noted that the ABC, INAC and EDO representatives also were asked to identify other capacity and readiness indicators important to Aboriginal tourism development, but that no other indicators were identified.

5.1 Summary of Importance and Presence Rankings

Exhibit 5.1 summarizes the rankings assigned by the survey respondents with regard to the importance of each indicator for tourism development and the presence of the indicators in the Aboriginal community as a whole.

The survey results confirmed that all of the indicators identified by the consultant team are important to development of the Aboriginal tourism industry in Canada. The “community resolution/declaration supporting tourism” indicator generally was deemed, however, to be of somewhat lesser importance than the other indicators.

Exhibit 5.1: Capacity & Readiness Indicators – Summary of Rankings

Indicator	Importance for Tourism Development			Presence in Aboriginal Community*		
	High	Medium	Low	High	Medium	Low
Community Commitment						
General community awareness of/support for tourism	19	1	0	4	8	7
Community resolution/declaration supporting tourism	13	2	5	6	5	8
Tourism identified as opportunity/priority in community/economic development plans	17	3	0	5	7	5
Economic development officer or similar available to assist tourism businesses	15	3	2	3	9	7
Participation of Elders/cultural keepers	16	4	0	5	6	6
Culture						
Existence of cultural preservation/ maintenance/enhancement initiatives	17	3	0	10	7	2
Existence of cultural events (e.g., festivals, gatherings)	15	4	1	12	6	1
Existence of cultural activities (e.g., traditional foods, arts and crafts)	18	2	0	10	8	1
Human Resources						
Existence of entrepreneurial initiatives	17	3	0	1	7	11
Availability of entry-level labour	19	1	0	9	7	3
Availability of experienced labour	19	1	0		6	13
Existence of accessible and affordable hospitality and tourism training	20	0	0	5	8	6
Existence of accessible and affordable business planning/management training	20	0	0	4	8	6
Existence of business support services	19	1	0	5	8	6
Product/Market Development						
Understanding of market needs/expectations	20	0	0	0	10	10
Access to market data, reports, studies	19	1	0	7	4	8
Understanding of product development and packaging techniques	19	1	0	0	8	11
Understanding of market research and planning	19	1	0	0	9	10
Understanding of importance of networks/linkages	20	0	0	2	15	2
Existence of networking opportunities (e.g., events)	19	1	0	4	12	3
Existence of networking services (e.g., marketing associations)	20	0	0	6	7	6
Availability of product development and marketing training	18	2	0	2	7	10
Availability of marketing planning and management assistance	19	1	0	2	8	10
Participation in regional initiatives	19	1	0	1	7	10

Indicator	Importance for Tourism Development			Presence in Aboriginal Community*		
	High	Medium	Low	High	Medium	Low
Technology						
Understanding of importance of technology/ computers for tourism	18	2	0	5	6	8
Access to "basic" communication tools (i.e., telephone, fax, toll-free telephone capabilities)	20	0	0	11	8	0
Access to Internet services (e.g., ISPs, website design and marketing, website hosting)	20	0	0	9	8	1
Ability to use technology for operations purposes (e.g., accounting, invoicing)	15	4	1	2	11	6
Ability to use technology for marketing purposes (e.g., website, internet marketing)	20	0	0	2	6	11

* Combined responses do not always add to 20, the total number of surveys completed, as some respondents were not able to comment on the presence of a particular indicator within the communities where they are involved with tourism development.

With regard to the presence of the indicators, the results are somewhat misleading in that respondents tended to provide a "medium" ranking in cases where the presence of the indicator varied from low to medium among the communities in the region in question. Given this situation, only a few indicators received comparatively high rankings in terms of presence. These few indicators are:

- existence of cultural preservation/maintenance/enhancement initiatives;
- existence of cultural events (e.g., festivals, gatherings);
- existence of cultural activities (e.g., traditional foods, arts and crafts);
- availability of entry-level labour;
- access to "basic" communication tools (i.e., telephone, fax, toll-free telephone capabilities); and
- access to internet services (e.g., ISPs, website design and marketing, website hosting).

5.2 Summary of Strategies for Improvement

In this section the strategies identified by the ABC, INAC and EDO representatives needed to assist with the development of each category of indicators are summarized. Prior to proceeding to the summary of actions that could be undertaken by ATTC and the RATAs to facilitate tourism development, it is important to note that two key findings emerged from interviews. First, the Atlantic Canada interviews indicated is that there is a critical need to develop a RATA in that region. Indeed, given the many cultural differences in the region, Atlantic region representatives generally think that several RATAs should be developed. Second, many of those interviewed stated that many of the suggested strategies could only be carried out if the RATAs are provided with more resources to deliver the needed programs.

5.2.1 Community Commitment

Community support is essential to successful tourism development, but a lack of awareness of the economic, social and cultural benefits of tourism was identified by many of those interviewed as a key constraining issue for the Aboriginal tourism sector.

This lack of awareness causes many Aboriginal people to view tourism development as a cultural sell-out. Other problems are that in many cases community leaders claim to be supportive of tourism, but fail to provide tangible or political support for tourism operations. Further, many communities fail to separate business and politics.

To address these issues, it is necessary to develop and implement tourism awareness plans and programs. To facilitate the implementation of tourism awareness plans, many of those interviewed indicated that the RATAs must have a greater community presence and that RATAs should be established in regions where they currently do not exist.
It is recommended that the tourism awareness programs focus upon a number of specific areas, as summarized below:

- Generating greater understanding among communities of tourism's ability to:
  - assist with preservation and revival of cultural heritage,
  - encourage knowledge of, and respect for, natural and cultural heritage,
  - provide an instrument for creating jobs and business opportunities within communities, thereby allowing First Nations youth to remain in their communities, and
  - provide direct benefits in the form of revenues and jobs, and indirect benefits such as the development of infrastructure and health, social and education services for communities.
- Developing understanding of tourism market composition and expectations, especially in regard to safety and security issues and customer care.
- Raising awareness of product development opportunities and assistance available to communities.
- Educating communities and individuals that getting involved in tourism does not equate to a cultural sell-out.
- Developing, distributing and presenting to communities case studies on economic, social and cultural impacts of projects which have been successful.
- Facilitating presentations by communities/operators successfully engaged in tourism.
- Educating EDOs so they understand the importance of tourism and how to take advantage of opportunities, and so they can help raise awareness.
- Encouraging communities to develop integrated plans that include land use and capital plans together with economic development/tourism development strategies in order to improve chances of success and get community buy-in.
- Developing understanding that the separation of politics and business is critical to tourism development success.

5.2.2 Culture

About one half of the individuals surveyed thought that initiatives and activities aimed at the preservation and/or revitalization of cultural traditions and customs were present at a high level in many Aboriginal communities. The other half of those surveyed suggested such initiatives were present at a low or medium level only, and that there is considerable room for improvement. One key issue is that virtually all of those interviewed stated that Aboriginal communities are not capitalizing on the demand for cultural tourism. Most cultural events and activities are small scale and geared to local resident markets, and communities do not recognize the considerable market potential that exists.

Suggested culture-related strategies ATTC and the RATAs can undertake to assist tourism development include:

- raising awareness of market demand for authentic cultural tourism experiences;
- encouraging communities to make decisions on which aspects of their culture they are willing to share;
- working with the Department of Canadian Heritage, the Canadian Tourism Commission, and provincial heritage and tourism organizations to establish programs that assist with the development and marketing of cultural events and activities; and
- developing a process to assist artisans in marketing cultural products, including the development of a certification system and product development, marketing and distribution strategies.

5.2.3 Human Resources

The availability of entry labour generally was not seen as being a constraint to Aboriginal tourism development, but many other training and education needs were identified. All of those interviewed stated that formal tourism training programs exist in the region where they are involved in tourism development, but many indicated that there is a lack of awareness of the programs that are available. In addition, more HR training and development options are needed and cultural appropriateness and geographical obstacles must be addressed.

Recommended strategies ATTC and the RATAs can undertake to improve human resource development include:

- raise awareness of the importance of tourism, hospitality and business training;
- develop and update on an ongoing basis a database of existing human resource and business support programs and how to access them;
- encourage communities to partner with other communities and tourism associations in their region to develop and implement regional tourism training strategies;
- provide culturally appropriate customer service/hospitality training which focuses on the expectations and needs of international visitor markets;
- provide entrepreneur-focused business management training, including time management and organization, strategic planning, accounting, finance and operational skills training;
- provide mentorship, coaching and internship programs which allow employees and entrepreneurs to obtain hands-on, one-on-one training and experience;
- provide distance training options to assist remote and difficult to access communities. Distance education methods seen to have potential include videos and CD-ROMs, video conferencing, self-study, and Internet delivery. However, it is felt that distance training can only be successful if accompanied by live-instructor individual or group training mechanisms and if the training is culturally appropriate;
- provide distance business support services (e.g., help lines, on-line help options); and
- encourage communities to enter into joint venture or partnership arrangements with non-Aboriginal partners to facilitate business management skills development.

5.2.4 Product/Market Development

The interviews clearly showed that product development and marketing are areas where progress is required. An underlying and critical problem is that communities and individual tourism operators do not have a good understanding of market needs and expectations.

An issue in this regard is the lack of access to information relevant to their needs, which is key to the development of awareness of market needs and expectations, professionalism and industry competitiveness. Although there is a variety of industry information available in various formats and sources, there is a lack of awareness among operators and communities as to what is available. Further, since the information is held by disparate sources, considerable time and effort is required to obtain the information required by an operator or community.

Other key issues are a lack of understanding of product quality expectations, product development and packaging techniques, and market research and planning techniques. Finally, there are a variety of funding constraints, including limited funding availability, inappropriate funding criteria and lack of awareness of available funding.

Strategies that ATTC and the RATAs can undertake to improve Aboriginal tourism product and market development include:

- raise awareness of the importance of product and market development training;
- develop and update on an ongoing basis a database of existing product and market development resources and how to access them;
- regularly disseminate information on product and market trends and characteristics;
- publish product development and marketing best practices;
- encourage and assist communities to develop regional tourism resource inventories;
- emphasize the importance of comprehensive marketing plans, and educate operators and communities that they must take responsibility for marketing their tourism products and services, rather than relying on the RATAs;
- provide product development and packaging and marketing training, including providing opportunities for learning through networking, mentorship and internship programs;
- encourage partnerships with non-Aboriginal partners for complementary product development and packaging purposes as well as marketing;
- develop stronger linkages with non-Aboriginal tourism associations and ensure that regional Aboriginal tourism marketing strategies reflect and are linked to other regional, provincial and national tourism marketing strategies; and
- work with governments and other partners to develop a product development funding/financing mechanism for providing equity and loan capital.

5.2.5 Technology

The interviews indicate that there is recognition that the world-wide tourism sector is embracing technology, and that that operational efficiencies achieved through technology adoption help to improve the financial position of tourism operations. In addition, the Aboriginal tourism industry increasingly recognizes the Internet's potential as a highly effective and efficient way for tourism operators to reach and be reached by consumers and the travel trade.

Although accessibility is more of an issue for remote areas, especially in terms of cost, there do not appear to be significant problems with regard to accessing either basic communication tools, such as telephone and fax, or Internet services. Rather the main technology-related challenge is related to providing the training required by communities and individuals to master the use of technology for operational and marketing purposes.

Strategies that ATTC and the RATAs can undertake to allow the Aboriginal tourism businesses to take better advantage of the benefits of technology include:

- raise awareness of the importance of technology in tourism business success;
- provide training in technology use and Internet marketing; and
- develop regional/national Aboriginal tourism Internet initiatives, including e-commerce capabilities and providing information on destinations, Aboriginal history and culture, and Aboriginal tourism product and service offerings online.

6. Tour Company Input

A survey of tour companies was undertaken to provide an industry perspective into emerging trends, market characteristics, product and market development opportunities, issues and constraints facing the Aboriginal tourism sector. Interviews were held with 14 Canadian, U.S., European and Japanese tour operators of varying sizes. The companies were chosen based on the following criteria:

- offer Aboriginal tourism product;
- focus on source market(s) known to be important for Aboriginal tourism experiences; and
- recommended by Aboriginal Tourism Team Canada or Canadian Tourism Commission, and/or known to consulting team from previous Aboriginal tourism projects.

Included in the interviews were two Aboriginal-owned tour companies: Moccasin Tours, owned by the Northern Ontario Native Tourism Association and Tours Innu, owned by the Quebec Aboriginal Tourism Corporation. Also included was DER Tours, a large German mainstream tourism tour operator that does not currently offer Aboriginal tourism products, but which has expressed interest in adding such products to their tour offerings. The results of the survey are presented in this section.

6.1 General Characteristics

Following are the general characteristics of the tour companies interviewed (**Exhibit 6.1)**:

- **Location –** Five of the companies are located in Canada, three in Germany, three in the UK, two in Switzerland, and one in the U.S.
- **Annual Visitors to Canada** – In terms of number of visitors to Canada, the client base of the companies ranges from 350 to 250,000. Four of the firms surveyed can be considered to have a small client base (up to 1,000 clients annually), five have a medium client base (between 1,000 and 25,000 clients annually) and three have a large client base (over 25,000 clients annually). The other two firms were not willing to provide information on the size of their client base.
- **Aboriginal Tourism Visitors –** Overall, the percentage of the total visitors to Canada who are seeking an Aboriginal tourism experience was relatively small for most operators (less than 10%). The exceptions were Creative Western Adventures (25%) and the two Aboriginal-owned tour companies (100%).
- **Origin** – Of the non-Aboriginal tour companies, three target the German market only, three the UK, two the Swiss, and one the Japanese market. The remaining three non-Aboriginal tour companies target mainly the European markets, but also cater to North American and other markets. The two Aboriginal-owned firms currently are more focused on North American markets. The majority (90%) of Moccasin Tours' clients are from the U.S. and are mainly anglers, but the firm intends to target other markets in the future, mainly Europe. In the case of Tours Innu, school groups comprise 50% of their clients and European markets the other 50%. Tours Innu is also working to make greater inroads into Europe.
- **Sales Channels** – Sales channels used were mixed, with about 50% of the firms selling mainly Direct to Client (including direct to clubs and associations) and the other 50% selling mainly through the travel trade (i.e., travel agents, wholesalers).

Company/ Location	Total Annual Visitors to Canada/ Aboriginal Tourism Visitors (%)*	Visitor Characteristics	Sales Channels
Canusa Touristik Germany	Annual Visitors: 9,000 Aboriginal Tourism Visitors: 5%	Origins: 100% Germany Age: 85% adults, 14% seniors, 1% children,	Direct to Client: 60% Travel Trade: 40%
Creative Western Adventures Canada	Annual Visitors: 400 Aboriginal Tourism Visitors: 25%	Origins: 80% Europe (mainly Germany & Switzerland, some France and Italy); 10% Cdn; 10% other Age: 90% adult (mainly 30 to 55 yrs); 10% children	Direct to Client: 60% Travel Trade: 40%
DER Tours Germany	Annual Visitors: 44,000 Aboriginal Tourism Visitors: do not currently sell, estimates 2-3% are interested	Origins: 100% Germany Age: 60% adults, 35% seniors, 5% children	Travel Trade: 100%
Great Excursions Canada	Annual Visitors: n/a Aboriginal Tourism Visitors: n/a	Origins: 60% Europe (France, Germany, Switzerland, Holland, UK); 40% Canada Age: 70% adults, 30% seniors	Direct to Client: 40% Travel Trade: 60%
Hotelplan Switzerland	Annual Visitors: 10,000 Aboriginal Tourism Visitors: < 1%	Origins: 100% Swiss Age: n/a	Direct to Client: 10% Travel Trade: 90%
Jonview Tours Canada	Annual Visitors: 250,000 Aboriginal Tourism Visitors: 10%	Origins: Europe (mainly UK, Germany, Holland and Switzerland) Age: 20% adults, 80% seniors, 1% children	Travel Trade: 100%
JTB International Canada	Annual Visitors: 90,000 Aboriginal Tourism Visitors: < 1%	Origins: 100% Japan Age: n/a; Aboriginal tourism visitors 100% 10 to 20 years	Travel Trade: 100%
Moccasin Trails Canada	Annual Visitors: 350 Aboriginal Tourism Visitors: 100% some Aboriginal content	Origins: 90% USA, 10% Europe (UK, France, Germany, Switzerland, Italy) Age: 90% adults, 10% seniors	Direct to Client: 90% Travel Trade: 10%
Pioneer-Erlebnisreisen Germany	Annual Visitors: 600 Aboriginal Tourism Visitors: 10%	Origins: 100% Germany Age: 90-92% adults; 8-10% seniors	Direct to Client: 95% Travel Trade: 5%
Saga Holidays U.S.	Annual Visitors: n/a Aboriginal Tourism Visitors: n/a	Origins: 100% UK Age: 100% seniors (50+ yrs, most 58 to 60)	Direct to Client: 100%
Sky Tours Switzerland	Annual Visitors: 5,000 Aboriginal Tourism Visitors: 1%	Origins: 100% Swiss Age: 100% adults	Direct to Client: 10% Travel Trade: 90%
Tailor Made Tours UK	Annual Visitors: 1,200 Aboriginal Tourism Visitors: 5%	Origins: 100% UK Age: 10% children, 40% adults, 50% seniors	Direct to Client: 100%
Thomas Cooke UK	Annual Visitors: 17,000 Aboriginal Tourism Visitors: 5%	Origins: 100% UK Age: 50% adults, 44% seniors, 6% children	Direct to Client: Cooke's Tours (groups) 95%; Thomas Cook holidays 20%; BA Holidays 30%
Tours Innu Canada	Annual Visitors: 1,000 Aboriginal Tourism Visitors: 100% some Aboriginal content	Origins: 50% Canada (mainly Quebec and Ontario schools) one-night tours; 40% France; 10% Italy Age: 50% adults; 50% children (school groups)	Direct to Client: 10% Travel Trade: 90%

*Refers to percent of total clients seeking Aboriginal tourism products
n/a = not available

6.1.1 Aboriginal Tourism Product Characteristics

- **Key Product Characteristics –** the representatives of the tour companies were asked to rate a series of key product characteristics with regard to their importance in an Aboriginal tourism experience. A three-point ranking scale was used, where 1=very important, 2=somewhat important, 3=not important. The responses were then weighted using the following process: 1) Multiply the number of respondents who indicated "very important" by three, "somewhat important" by two, and "not important" by one; 2) Total weighted numbers and divide by total number of respondents to obtain weighted ranking.
- Based on this process, the top five product characteristics identified were nature experiences, getting to know local people, outdoor activities, local arts and crafts, and sampling local cultural foods (**Exhibit 6.2**).

Exhibit 6.2: Key Product Characteristics

Product Characteristic	Importance Ranking
Nature experiences	2.64
Getting to know local people	2.57
Outdoor activities	2.50
Local arts & crafts	2.36
Sampling local cultural foods	2.35
Cultural or interpretive centre/site	2.07
Wilderness setting	2.00
Cultural performance (theatre, dance, song, other)	1.86
Ability to communicate in visitor's language*	1.64

* Question was not asked of three tour operators focusing exclusively on English-speaking source markets

- **Preferred Experience Length** – With regard to the preferred length of an Aboriginal tourism experience, the responses of the tour company representatives clearly show that the vast majority of clients are seeking an experience of less than one day. This was particularly true of companies catering to mass tourism markets (i.e., Canusa Touristic, DER Tours, Hotelplan, Jonview Tours, JTB International, Saga Holidays, Sky Tours, Tailor Made Holidays and Thomas Cooke). With the exception of Moccasin Trails, which mainly sells angling packages, even the smaller niche tour companies indicated that most of their clients prefer an Aboriginal tourism experience of less than three days (**Exhibit 6.3**).

Exhibit 6.3: Preferred Length of Aboriginal Tourism Experience

Company	Days
Canusa Touristik	70% < ½ day 20% ½ to 1 day 9% 2 to 3 days 1% 4 to 7 days
Creative Western Adventures	60% up to 3 days 40% 4+ days
DER Tours*	50% ½ to 1 day 50% 2 to 3 days
Great Excursions Co.	No comment
Hotelplan	100% < ½ day
Jonview Tours	90% ½ to 1 day 10% 2 to 3 days
JTB International	100% ½ to 1 day
Moccasin Trails	90% 4 to 7 days 10% 8 to 14 days
Pioneer-Erlebnisreisen GmbH	50% 2 to 3 days 50% 4 to 7 days
Saga Holidays	100% ½ to 1 day
Sky Tours	80% ½ to 1 day 20% 2 to 3 days
Tailor Made Tours	80-90% ½ to 1 day 10% 2 to 3 days
Thomas Cooke	50% < ½ day 50% ½ to 1 day
Tours Innu	90% ½ to 1 day 10% 2 to 3 days

* Forecast, not actual, percentages

- **Percent Purchasing as Part of a Longer Package –** The survey results clearly show that the Aboriginal tourism experience tends to comprise only one part of a Canadian vacation experience. With the exception of Tours Innu, which mainly caters to school groups taking a 100% Aboriginal tourism experience, all of the tour companies indicated that most of their clients purchase an Aboriginal tourism experience as part of a longer vacation package that includes other types of tourism product (**Exhibit 6.4**).

Exhibit 6.4: Percent of Clients Purchasing as Part of Longer Package

Company	Percent
Canusa Touristik	100%
Creative Western Adventures	80%
DER Tours*	100%
Great Excursions Co.	100%
Hotelplan	80%
Jonview Tours	100%
JTB International	100%
Moccasin Trails	99%
Pioneer-Erlebnisreisen GmbH	100%
Saga Holidays	100%
Sky Tours	100%
Tailor Made Tours	100%
Thomas Cooke	100%
Tours Innu	30%

* Forecast, not actual, percentages

6.1.2 Key Aboriginal Tourism Trends

When tour company representatives were asked about key trends affecting the demand for Aboriginal tourism, their responses fell into four main categories as follows:

- **Learning and experiential tourism –** Demand for interpretation, education and participation as part of the vacation experience is growing rapidly. Culture-, nature- and history-based tourism products that focus on providing high-quality, authentic, experiential and interactive learning experiences are experiencing increased popularity. Aboriginal tourism incorporates culture, nature and history and has significant potential for the learning tourism market.
- **Nature-based tourism –** Demand for nature-based tourism has grown significantly over the last decade. Travellers not only wish to see flora, fauna and landscapes, but also to experience nature and learn about it within a natural setting. Aboriginal tourism benefits from this demand because Canada has an excellent reputation as a nature-based tourism destination and Aboriginal tourism product generally focuses upon nature and is delivered in natural settings.
- **Environmental and cultural awareness –** More travellers are concerned about their impact on the environment and on local cultures. Further, they are more interested in learning about, understanding and experiencing nature and other cultures. Given the richness of Canada's Aboriginal culture and since Aboriginal people are seen as the original environmentalists and have a close relationship with nature, these trends are translating into increased interest in Aboriginal tourism experiences.

- **Mainstream market interest** – While Aboriginal tourism previously attracted a small niche market of wealthier, more educated, well-travelled people, mainstream tourists are now becoming more interested in participating in Aboriginal tourism experiences and in developing personal relationships with Aboriginal people.

6.1.3 Issues Constraining Aboriginal Tourism

When tour company representatives were asked about key issues constraining the demand for Aboriginal tourism, their responses fell into two categories. First, a number of product-related issues were identified:

- **Product quality –** There is lack of understanding of market expectations and as a result many Aboriginal tourism businesses suffer from product quality issues in areas ranging from product experience to maintenance, housekeeping, product delivery and customer service. Specific problems mentioned include poor facility maintenance and cleanliness, programming that appears to be staged rather than being authentic, inconsistent and unreliable product delivery, and a lack of professional customer service.
- **Product packaging –** Lack of understanding of market expectations also extends to product packaging. The tour company representatives indicated that there are insufficient market-ready and export-ready product packages, and education of Aboriginal tourism businesses on how to package for the international market is required.
- **Accessibility –** Tour operators, especially those catering to mainstream tourism markets, think that much of the Aboriginal product that exists is too far off the beaten track. Much of the available Aboriginal product is located far from gateway cities and major routes, making it difficult to include in tour packages.
- **Price –** The price being charged is often too high. While there is some room to surcharge, it is necessary that Aboriginal tourism products be more price competitive with non-Aboriginal tourism products.

Second, there is the issue of awareness and marketing. To begin with, tour company representatives stated that there is a general lack of awareness in key source markets, especially among mainstream tourists, as to the Aboriginal product available in Canada. Many visitors see Canada as a nature destination, and are not aware of its rich Aboriginal cultural tourism offerings. Related to this lack of awareness, the tour companies indicated that Aboriginal tourism marketing is ineffective. Neither Canadian destination management organizations, including Aboriginal tourism associations, or Aboriginal operators are doing a good job of packaging or promoting Aboriginal tourism product. There is a lack of professionalism, and education is required on how to package for the international market and how to approach and work with inbound and receptive tour operators.

6.1.4 Best Aboriginal Tourism Opportunities

The representatives of the tour companies indicated that export-ready products are required, and that the four best opportunities for development of the Aboriginal tourism sector are:

- **Learning and experiential tourism** – unique, authentic, participatory experiences that go beyond storytelling and performances, and allow for first-hand learning of Aboriginal history, traditions, culture and lifestyle as well as the building of relationships with local people. Short learning tourism experiences of ½ to one day are recommended to accommodate the mainstream tour market, especially the bus tour market, while longer two to three day plus experiences are recommended for special interest tourism markets.
- **Eco-cultural tourism –** add value to ecotourism and nature-based tourism focused product markets by using Aboriginal guides and layering cultural tourism aspects into the experiences.
- **On-the-beaten-track products and services** – cater to mainstream market by locating products and services in or near to gateway cities, national parks and major routes.
- **Partnering –** to capitalize on travellers' desire to have an Aboriginal tourism experience as part of a larger package, partner with other tourism operators to create packages that combine a variety of Aboriginal and non-Aboriginal tourism experiences.

6.1.5 Assistance to Tour Companies

With regard to what information or assistance would encourage the tour operators to offer Canadian Aboriginal tourism products, major responses fell into two areas:

- **Additional information –** many of the tour operators indicated that having more information on Aboriginal tourism product would be useful, and that destination tourism organizations should include more information in their sales kits. In addition to printed and audio-visual promotional materials, tour operators indicated that they would like to be able to access a database of digital materials useful for brochure production, such as photos and maps. They also would like to see a comprehensive database of available market-ready product.
- **Marketing and marketing support –** the tour operators indicated that more marketing and marketing support is required, including higher visibility for Aboriginal tourism at consumer and industry trade shows and in the media. Opportunities to learn about and experience products first-hand through workshops, seminars and fam tours are needed. In addition, several operators indicated that more online marketing is required. A central website that includes information on Aboriginal news, history and product information and allows for online booking and reservations is recommended.

7. Case Studies – Key Findings

For the case studies, we interviewed three Aboriginal tourism ventures and a regional Aboriginal tourism association. They were selected on the basis of their achievements, operation size and type, geographic location, anticipated interest of the Aboriginal tourism industry, and by recommendation of Aboriginal Tourism Team Canada. During the interviews, the ventures shared their experiences revealing what they did to overcome issues and concerns, and mapping out how they developed their ventures.
The Aboriginal tourism initiatives featured in the case studies are described further below with full profiles being attached in **Appendix 2**.

- The Quebec Aboriginal Tourism Corporation (Société touristique des Autochtones du Québec, STAQ) is amongst the longest established RATAs in Canada. Over the years, it's transformed itself from a localized organization that worked with two Innu nations to expand their participation in tourism, to an entity that facilitates partnerships and supports the high-quality, consistent development of Aboriginal tourism throughout Québec. STAQ's accreditation standards are used to guide new and existing operations to satisfy industry standards for market and export readiness, and as well to respect cultural values and principles.
- The St. Eugene Mission Resort is a destination resort consisting of an 18-hole championship golf course, conference meeting facilities, Ktunaxa interpretive centre and gift shop, and a 120-room Delta hotel all on the historic site of an Indian residential school. The Casino of the Rockies will be situated adjacent to the Hotel enabling the Ktunaxa/Kinbasket Tribal Council member Bands to develop more jobs on-site and even greater economic spin-offs. The building is situated on an Indian Reserve in southeastern British Columbia on lands held in trust for the five Canadian Bands of the Ktunaxa nation. The resort was in the planning for twelve years requiring the Bands and their consultants to engineer solutions to put together a $40 million plus financing package that would result in 270 direct and a further 270 indirect jobs, as well as return benefits and culture back to the Ktunaxa.
- In the newly named territory of Nunavut, the decade-old businesses of Timmun and Kristiina Alariaq expanded from a 'just-like-home' bed and breakfast business to shaping the tourism industry of Cape Dorset by bringing Inuit educational experiences to cruise ship passengers. Huit Huit Tours provides the vehicle for local Inuit people to share their culture as tour guides in the community, land and sea, and as story tellers, throat singers and dancers in performances delivered by Elders, artists and other entertainers. Also through Huit Huit, the Inuit people are ensuring the tourism industry in Cape Dorset is developed in a manner that meets their needs and concerns resulting in benefits to the people while maintaining cultural and environmental sustainability.
- The last venture is a tipi camp offering ecotourism experiences in Ontario. Temagami Anishnabai Tipi Camp (TATC) is situated roughly five hours from Toronto, in a community where Hudson Bay Company once had a trading post and nature writer Grey Owl was married. TATC has been operating for five years, exposing North American and international guests to the beauty of the land and waters, while sharing the values, traditions and beliefs of the Ojibway way of life. The camp targets small groups and independent travellers to ensure that the impact on the land and community are minimal, and the guest experience is memorable.

The following is a summary of the lessons learned and key findings of these ventures. Through their stories, we hope to reveal approaches and strategies that could assist other Aboriginal tourism businesses and associations grow, avoiding the pitfalls and enabling them to realize success sooner.

7.1 Community Involvement

In remote or rural regions of Canada, real opportunities exist for them to help shape and mould the regional tourism industry. Huit Huit Tours and the Ktunaxa/Kinbasket Tribal Council's St. Eugene Mission Resort Development are examples of this.

- Owners/operators Timmun and Kristiina Alariaq of Huit Huit realized that unless people (community members) became involved in developing plans on how Cape Dorset would develop tourism, the benefits available to the Inuit people could be lost resulting in an industry that provided no return to the original people of the land and harmed the natural environment that the Inuit people still practiced traditional lifestyles on. Getting involved in and ensuring that other Inuit people participated in the planning, not only of the community, but also the tours, has resulted in Huit Huit tours doubling their sales.
- For the St. Eugene Mission, the five Ktunaxa Bands conducted outreach sessions for Band members and local non-Aboriginal organizations and governments to provide information on the proposed development, gather ideas and concerns, and to generate support. These community outreach sessions included delivering presentations to organizations like the Rotary Club and Chambers of Commerce, and displaying development plans at Cranbrook's annual Kinsmen Tradeshow. The support gained from these activities is believed to have been instrumental in securing program approval for funds, which were essential to attracting private investment and debt financing. Those outreach sessions were also considered essential to the pre-opening promotion for the golf course and other business components.
- STAQ regularly promotes the benefits of tourism and provides information on the industry and Aboriginal tourism businesses to Aboriginal communities seeking information to evaluate whether tourism should be a part of their economic development strategies. Providing this information is important to STAQ as they believe it contributes to the development of a quality consistent industry that meets both industry and Aboriginal expectations while steering entrepreneurs to developing products that capitalize on opportunities, rather than competing head-on with other tourism businesses. Through these outreach sessions, STAQ is helping to connect the operators with each other and emerging opportunities.
- Involving the Aboriginal community in planning for tourism has been important. RATAs such as STAQ provide information to communities on the benefits of tourism and how the industry works, while operators have discovered that working with community members has helped to generate ongoing support for their developments and interest in employment. This support has led to the improvement of the community aesthetics, interest in working in the industry, preparation of cultural knowledge for sharing with visitors, and most important, residents being more welcoming to visitors.

The Temagami Anishnabai Tipi Camp involved the community members and Chief and Council early when the business plan was being developed. The community helped guide the concept identifying acceptable activities and places to visit, providing a Band Council Resolution (BCR) endorsing the camp. The relationship developed with the Band early on ensures camp guests are respectful of the community and culture, minimizing the impact on the environment, and enabling the community to feel comfortable inviting camp guests to community gatherings and celebrations. The camp is also available to the Band for community events in the spring and fall for day care and other gatherings and celebrations.

7.2 Marketing

'If you build it, they will come'… a saying that is used all too frequently by business. Understanding the nature of your business, the industry and its markets has helped the ventures to attract new customers enabling them to achieve and exceed their operating goals.

- For the St. Eugene Mission Resort in Cranbrook, pre-opening marketing has been building awareness and anticipation for the opening of the resort. The first phase to open was the golf course, which exceeded sales projections in its first two years of operation and was awarded third in the Golf Digest Best New Golf Course of the Year Category. Hotel partner, Delta/Fairmont Hotels & Resorts, has sent out its Sales Team to regional corporations to promote convention and meeting facilities to build low-season sales and is actively promoting golf packages to tour and bus operators.
- Not all marketing activities will produce results. Huit Huit Tours learned that after they hosted some media writers - they didn't write anything. So, after that, they decided to get advice from industry representatives such as Tours Innu on participation in fam tours and other promotional activities. Kristiina said, "Fam tours and advertising are marketing activities - they should be seen that way, and produce results."
- When expansions take place, there are many changes, but not everything needs to change. STAQ understood that they did a good job establishing Tours Innu and building its awareness. So while the association's name change to STAQ was needed, the name Tours Innu had to remain the same to ensure the other Aboriginal tour packages could capitalize on the success achieved already from selling Innu tour packages.
- Temagami Anishnabai Tipi Camp (TATC) wishes they knew more about marketing and how to market when they started. Over the years, they've realized the value of maintaining contact with their past customers who have sent family and friends to the camp and have also returned. TATC uses its membership with organizations such as NONTA and the Temagami Chamber of Commerce to market its business, rather than spending money on advertising. Marketing budgets are partnered with other marketing programs.

7.3 Partnerships

Partnerships have been an important element to the success of the ventures. Partners have provided the knowledge, skills and industry connections that the Aboriginal partners do not have, while the Aboriginal business often contributes lands, resources, accessible labour and cultural knowledge, more so when the partner is an Aboriginal group.

- STAQ and the Aboriginal tourism businesses have found that partnerships have meant that more can be achieved. Partners have often been chosen on the basis of their connections and shared values and principles. The basis of the Product Club the STAQ leads is partners. Each partner contributes ideas and other resources and is required to demonstrate its commitment to building the Aboriginal tourism industry.
- As the Ktunaxa Bands were developing the St. Eugene Mission Resort, they knew they were neither hotel nor golf course managers, and lacked the skills to effectively promote the resort to international markets. Hotel and golf course partners were found that had the skills and also the credibility to launch the resort as a high-quality venture.
- New partners are helping Huit Huit Tours to develop tour packages that produce mutual benefits to Huit Huit and its new transportation partners.
- Funding and marketing partners have enabled Temagami Anishnabai Tipi Camp to get the most out of its marketing and capital dollars. Relationships developed through membership and directorship of regional and tourism organizations have increased TATC's exposure and knowledge of the industry, emerging market opportunities, and connections within the tourism industry.

7.4 Developing Products, Training and Human Resources

Part of developing a strong Aboriginal tourism industry is ensuring that the products understand and satisfy industry requirements and that there is a skilled, available labour force. Regional Aboriginal Tourism Associations contribute to this by preparing the community and guiding operators with developing and operating their businesses. Major Aboriginal tourism developments have also realized that human resources training plans have to be a part of the development plans, and be implemented prior to opening.

- STAQ offers workshops on industry standards and works one-on-one with operators to help guide them in developing businesses that satisfy industry standards and respect the Aboriginal cultures they represent. The accreditation program they created is key to guiding this process demonstrating to the operators the practices are fair, and helping industry operators to identify market-ready Aboriginal tourism products.
- The Ktunaxa/Kinbasket Tribal Council's human resources, employment and education departments became involved in the St. Eugene Mission Resort planning early in the concept development stages. From the knowledge of the potential jobs during construction and operations, and the possible business opportunities, the team with the resort consultants and then eventually the resort managers worked on training plans and promoting the qualifications required to access these opportunities. The College of the Rockies in Cranbrook also joined the team by developing hospitality, golf course and resort management courses connecting them to the resort.
- While it has been the desire of the Ktunaxa Bands to ensure the hiring of Aboriginal people, they've chosen to focus on helping prospective employees qualify for these positions rather than solely setting hiring targets. Employing Aboriginal people has been important to the Bands, but they've realized that future employment opportunities are dependent on investing in and hiring the right people today.
- Business plans are road maps to developing and expanding the business. Temagami Anishnabai Tipi Camp has implemented its business plan in stages, ensuring that both

staff and guests are oriented on the values and principles of sustaining the land and the Anishnabai Ojibway culture. Hiring the right consultant and getting management, computer and camp operation training at the beginning helped TATC develop a business plan and acquire the financing and knowledge it needed to be successful from the beginning.

7.5 Culture and Sustainability

Several Aboriginal communities have voiced concern about the tourism industry, expressing views that tourism 'sells out' Aboriginal cultures. Not all Aboriginal communities share that sentiment. Others have seen tourism as a means to promote better understanding of their history, culture and values, as well as a means to preserve and build interest amongst their people in preservation and revival of their culture and language.

- For the tours that Huit Huit offers, they ensure other Inuit people are involved with the planning of each new tour and improvement of past ones. Guides offer ideas on what should be included and where to go. Traditional values of taking out what you bring in and respecting the land have become operating principles respected by all guides and employees.
- The accreditation program STAQ assesses the Aboriginal tourism businesses against is rich with cultural values and sustainability principles. In the development of the program and guidelines, STAQ went to the communities and invited comments to ensure that the program was not only applicable to the businesses and industry, but also that it respected the cultures of the Aboriginal people.
- The St. Eugene Mission Resort development involved the Bands and community members in identifying land use and cultural concerns early in the concept and construction plans. While the resort has been made possible by the partnerships the Ktunaxa established, the Ktunaxa Interpretive Centre and other cultural components have remained in the exclusive ownership of the Ktunaxa. This is enabling the people to develop cultural initiatives that they feel comfortable sharing.
- "Always focus on your vision, why you started, and be mindful of the values and principles of your culture," advises Virginia McKenzie, owner of Temagami Anishnabai Tipi Camp. The guest orientation program teaches the Anishnabai values pledging a minimal impact on the lands and the respect for the community and people. Involving the Band, Chief and Council in developing the plans and opening the camp to the community has ensured TATC is able to develop a consistent, quality and culturally respectful experience.

8. Business Operator Survey

This section of the report presents the findings of a supplemental survey administered to Aboriginal tourism business owners/managers, which was conducted as part of the economic impact assessment portion of the project.[1] The intent of the supplemental survey was to collect information on the issues and factors impacting the performance of Aboriginal businesses, and on the types of training and other assistance needed to improve performance. Information was sought in six areas:

- business skills and knowledge;
- human resources management;
- marketing;
- financing;
- sources of assistance; and
- solutions (assistance required for improvement).

8.1 Survey Administration

As noted above, the supplemental survey of Aboriginal tourism business owners/managers was an integral component of the overall business operator survey. A national population of active Aboriginal businesses was identified from ATTC database information (up to 2001) and validated with inputs from Regional Aboriginal Tourism Associations (in early 2002). The survey design was led by Goss Gilroy Inc., who were assisted by ATTC (and the study's advisory committee) and BearingPoint. The actual field implementation of the sample design was carried out under contract to G'Nadjiwon Ki Aboriginal Tourism Association, based in Midland, Ontario (see below for further details). The subsequent data processing, analyses and reporting of the survey data were done by Goss Gilroy Inc., again working closely with ATTC and BearingPoint.
The sample design for the supplemental survey involved the following important features for the purposes of the study:

1. A target sample size of 62 Aboriginal businesses were randomly selected from the aforementioned national list according to a predetermined sample allocation scheme encompassing both economic sector and regional coverage.
This allocation scheme targeted 60% of the sample towards the tourism sectors where economic activity of Aboriginal businesses is most likely – denoted Level 1: Transportation, Outdoor Adventure, and Accommodations; while 40% of the sample was allocated towards the other tourism sectors – denoted Level 2: Attractions, Food and Beverage, Travel Trade, Events, and Retail (Tourism Services).

2. Also, the allocation targeted the sample across the provinces and territories, resulting in a percentage regional allocation of 15% for the Atlantic (Newfoundland, PEI, New Brunswick, Nova Scotia), 20% for Ontario, 40% for the West (Manitoba, Saskatchewan, Alberta, BC), and 25% for the North (Yukon, NWT, Nunavut).

[1] The results of the economic impact are provided in a separate report, entitled *Aboriginal Tourism in Canada – Part I: Economic Impact of the Sector.*

The sample collection methodology was based on telephone interviews using a predetermined questionnaire. The questionnaire averaged 45 minutes to complete. Highlights of this collection process included: a pretesting (and appropriate revisions) of the questionnaire prior to full field implementation; multiple call-backs for respondents unable to participate at time of initial call; ongoing tracking of non-responses by various characteristics; and, computerization of the collected results for transfer into SPSS data analysis package at Goss Gilroy Inc. The data collection period covered the summer months into the early fall, 2002.

The final sample results for the supplemental survey are summarized in terms of the design targets noted above:

- the final achieved sample of 47 respondents is 76% of the target sample (62) – a reasonably good performance against the overall design goal;
- the 47 samples subdivide into 31 (66%) and 16 (34%) for Level 1 and Level 2 economic sector coverage – this result compares quite favourably with the targeted allocations of 60% and 40% respectively; and
- the achieved regional sample coverage is: 17% for the Atlantic; 17% for Ontario; 40% for the West; and 26% for the North – again, this compares quite favourably with the design allocations of 15%, 20%, 40%, and 25% respectively.

Overall, the sample results are close to the intended design, and hence provide reasonable estimates at the national level for frequently occurring responses to the questionnaire. Due to the overall small number of responses (47 in all, or even, 62, by design), the (more frequent) results to the supplemental survey should be treated as first-cut descriptions or indications of what may be happening in the Aboriginal business community at the national level. Although the results cannot suggest definitive or precise conclusions, nevertheless, the achieved samples should provide useful information on an array of important issues and questions addressed by the questionnaire.

8.2 Survey Responses

In total, 201 respondents completed the economic impact survey questionnaire. Of these, 23% (47) also completed the supplemental survey. The table following provides a breakdown of the geographic location of the 47 respondents.[2]

[2] There are no respondents from Quebec. At the time the national study was conducted, the Aboriginal Tourism Association of Quebec (STAQ) was planning to carry out a parallel study of businesses located in that province, therefore Quebec operators were not included in this study. The Quebec study has not been carried out to date, but is still planned.

Exhibit 8.1: Geographic Distribution of Supplemental Survey Responses

Province/Territory	# of responses
Newfoundland	3
Nova Scotia	1
PEI	1
New Brunswick	3
Ontario	8
Manitoba	5
Saskatchewan	5
Alberta	4
British Columbia	5
Northwest Territories	5
Nunavut	4
Yukon	3
TOTAL	**47**

Given the small sample size of every province/territory, it is not possible to provide analysis of the survey results on a provincial/territorial basis, or even regional or business type basis. Further, given the small sample size overall, the survey results cannot be seen to provide definitive information on the factors impacting the performance of Aboriginal businesses or the assistance needed to improve performance. Rather, the results provide indications which, when taken together with the other research performed in these areas, are nonetheless useful.

Although the results are useful, particularly the responses on the types of training and assistance required, it must be noted that in many cases the results seem to contradict the opinions of experts surveyed for this project, such as the travel trade representatives, key informants and those who participated in the capacity and readiness survey. For example, the results show that the vast majority of operators think that their marketing efforts are highly effective. Yet many of the other experts indicated that effective marketing is a key issue for Aboriginal businesses.

At least two explanations may account, at least partially, for at least some of the discrepancies:

- It may be that the wording of the questions affected the results. For example, high percentages of affirmative responses were received for questions such as “Do you have a business plan?” and “Do you have a marketing plan?” It is possible that the results would have differed significantly if the question had been “Do you have a <u>written</u> business/marketing plan?”
- It may be that those business owners who chose to participate in the survey were those who are relatively more experienced and sophisticated. Certainly, such business owners would be more likely to appreciate the importance of the survey and the potential it provides for securing appropriate assistance for Aboriginal tourism businesses. However, the responses provided by such business owners would likely not be reflective of the experience of the Aboriginal sector as a whole. If this were the case, it provides a possible explanation for why unexpected results were achieved.

In any case, it must be recognized that the results provide indications only and must be interpreted and used with caution.

8.3 Survey Results

Each of the following sections begins by summarizing the responses provided to each question of the supplemental survey. In each case, the question posed and the number of respondents that answered that particular question are provided.[3] Following the summary of responses, conclusions are drawn with regard to the implications of the responses.

8.3.1 Business Skills and Knowledge

A number of questions were asked to provide insight into Aboriginal tourism business operators' general level of basic and tourism-related business skills and knowledge:

- **Do you have a business plan?** (46 responses) – Nearly three quarters (72%) of respondents have a business plan.
- **Do you have cash flow projections for the next 12 months?** (46 responses) – Well over half (57%) of business operators said that they have cash flow projections for the next year.
- **Do you measure your projected costs against your actual costs?** (45 responses) – 72% of respondents measure their projected costs against actual costs.
- **How well can you explain your financial statements?** (45 responses) – More than three quarters (76%) of business owners felt that they could explain their financial statements well, while 24% indicated they could not explain these well.
- **How well do you understand your debt-to-equity ratio?** (42 responses) – A majority (70% or 29 respondents) of business owners indicated that they have a good understanding of the debt-to-equity ratio of their operation.
- **Have you previously taken any tourism business related training?** (47 responses) – This question sought to gain insight into the extent to which Aboriginal tourism business owners/managers have acquired training in areas key to running successful tourism businesses. Eighty-nine percent of respondents have taken some form of training designed to assist them in operating their tourism business. Of those who had taken training, about one half have taken accounting/bookkeeping (55%), first aid (49%) and/or business planning/management (47%) training. About 40% have customer service/frontline training. About one third or fewer managers have taken any other form of training. At least one previous study[4] examining success factors of Aboriginal businesses concluded that using technology contributes to overall business success. It is therefore interesting to see the extent to which Aboriginal tourism businesses are using computers to improve their operations and marketing effectiveness. The two questions following attempt to provide insight in this area.

[3] In some cases the questions were not applicable to the respondents' operation, the respondents chose not to or they were unable to answer a particular question.

4 Industry Canada, David Caldwell and Pamela Hunt. July 1998. Aboriginal Businesses: Characteristics and Strategies for Growth.

Type of Manager Training	Percent
Accounting/Bookkeeping	55%
First Aid	49%
Business Planning/Management	47%
Customer Service/Frontline	40%
Technology/Computers	36%
Leadership	36%
Tour Guide	34%
Marketing/Promotion	34%
Product Development/Packaging	28%
Maintenance	28%
Outdoor Guide	26%
Cultural Interpretation	17%

* Note: multiple responses allowed

- **Do you currently use or plan to start using computers for operations purposes (e.g., accounting, invoicing, purchasing)?** (47 responses) – 79% of respondents use computers for operations purposes, while 13% plan to start using them. The remaining 9% do not use or intend to start using computers for their operations.
- **Do you currently use or plan to start using computers for marketing purposes (mailing lists, research, email communication, internet marketing)?** (47 responses) Significantly fewer businesses use computers for marketing than for operations purposes: 64% currently use computers, 21% plan to start using them and 15% do not use or intend to start using computers.

Summary Business Skills and Knowledge Results

The results indicate that the majority of business owners/managers recognize the importance of business and financial planning and have a good level of basic business understanding. Most have business plans and cost flow projections. A majority understand the importance of measuring projected against actual costs, and they understand their financial statements and debt-equity ratios. These results are somewhat surprising given that many of those knowledgeable about the Aboriginal tourism interviewed for this project indicated that a lack of business understanding and sophistication is a key issue facing the sector.

On the question of the extent to which Aboriginal tourism owners are using computers, the results show that a majority are using computers. In regard to business training, about half of business owners have taken key types training, such as accounting/bookkeeping and business planning/management. Much lower percentages have taken other important types of tourism business training, such as customer service, marketing and product development. Even though the results indicate that many business owners are using computers and that they have taken at least some business training, it is certain that the sector would perform much better if more owners/managers had formal business and technology training. The results of the survey questions on training and assistance required (**Section 8.3.6)**, indicate that the owners recognize that they require additional training in these areas in order to improve their performance.

8.3.2 Human Resource Management

The questions on human resource management attempt to gain insight into the availability of skilled Aboriginal employees and the extent to which Aboriginal tourism businesses have formal human resource policies and training in place for employees.

- **Is it difficult to find Aboriginal employees with the knowledge and skills you need to run your business?** (45 responses) – Well over half (58%) said that it is difficult to find Aboriginal employees with knowledge and skills appropriate for working in a tourism business.
- **Which human resource management policies do you have in place?** (47 responses) The results show that 62% of businesses have fire safety procedures in place. About half have job descriptions (53%), disciplinary procedures (52%), staff policies (51%), cultural guidelines (51%) and codes of conduct (49%).

HR Policy	Percent
Fire & Safety Procedures	62%
Job Descriptions	53%
Disciplinary Procedures	52%
Staff handbooks/policies	51%
Cultural Guidelines	51%
Code of Conduct	49%
Training Manuals/Videos	36%
Organizational Chart	34%

* Note: multiple responses allowed

- **Do you provide training for your employees?** (45 responses) – 71% of Aboriginal tourism businesses provide training for their employees. Of those businesses that provide employee training, more than half (53%) provide customer service/frontline, 48% provide first aid and 38% provide leadership training. Less than a third of operators provide any other type of training for employees.

Type of Employee Training	Percent
Customer Service/Frontline	53%
First Aid	48%
Leadership	38%
Maintenance	31%
Product Development/Packaging	28%
Outdoor Guide	28%
Marketing/Promotion	25%
Tour Guide	25%
Technology/Computers	25%
Accounting/Bookkeeping	22%
Business Planning/Management	19%
Cultural Interpretation	16%

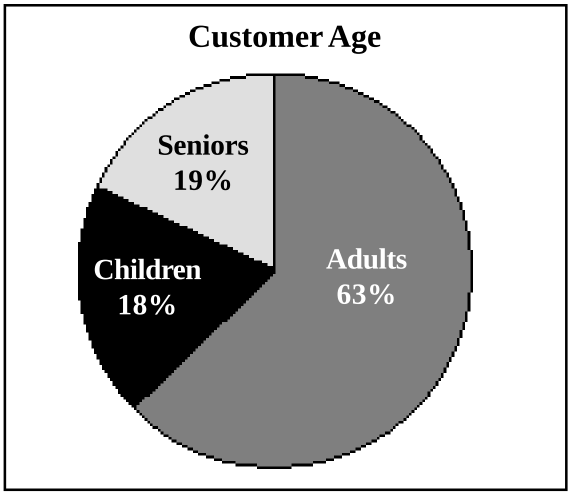
* Note: multiple responses allowed

A majority of Aboriginal tourism business owners find it difficult to find appropriately trained staff, an issue that must be overcome if the Aboriginal community is to take full advantage of the economic benefits of tourism development. The percentages of owners who have formal human resource policies in place and who provide training for their employees are encouraging. Nonetheless, there is little doubt that improvements are required in human resource training and management within the sector. Again, the results of the questions on training required for employees (**Section 8.3.6**) show that business owners appreciate that this is the case.

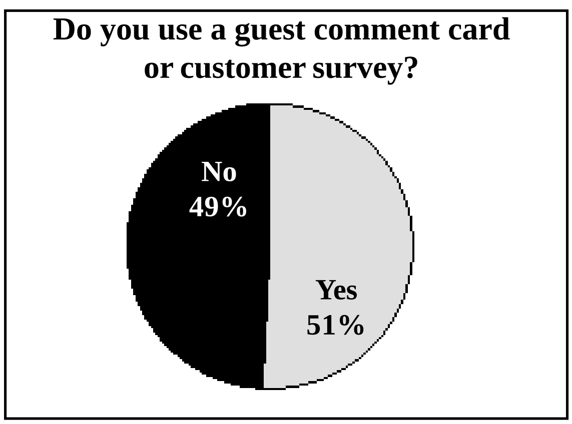
8.3.3 Marketing

Operators were asked to provide information on their marketing activities including how they develop relationships and maintain contact with their customers. In these questions we asked what marketing tools they used, the origin of their customers including the breakdown of domestic and international, and whether a marketing plan guided their marketing activities. Recognizing the importance of cooperative marketing activities, another goal was to assess whether there are marketing partnerships formed, with whom and whether there are relationships with travel agents and tour operators:

- **What percentage of your customers are tour groups and individuals?** (45 responses) – On average, 19% of customers are tour groups while 81% are individuals. The most frequent (mode) response came from 11% of respondents who indicated that 10% of their customers are tour groups and 90% are individuals representing a cumulative average of 58% of responses.
- **What are the age groups of your customers?** (44 responses) – 64% of respondents indicated that 10% or less of their customers are 16 years or younger (children), while 93% reported that 17-54 year olds (adults) are 80% or less of the customer base, and 39% of respondents said 55+ years (seniors) represented 10% or less of their customers. On average adults were 63% of visitors, seniors represented the next largest segment at 19% and children were 18%.



- **What proportion of your guests are repeat customers?** (44 responses) Roughly 18% of operators indicated that 50-60% of their customers were repeat, while 11% of respondents felt that all of their customers were repeat.
- **Do you communicate with your past customers?** (45 responses) 87% of businesses maintain contact with their past customers.
- **Do you use a guest comment card or customer survey?** (45 responses) In 51% of the operations (23 businesses) surveyed a guest comment card or customer survey form is used.



- **Where do your customers come from – Canada or other countries?** (47 responses) Canadians are the largest market for Aboriginal tourism businesses. 38% of operators reported that 90% to 100% of their customers were Canadian and of the 47 respondents, 13% indicated that all (100%) of their customers originated from Canada while another 11% said it was a split of 90% Canadian and 10% other country. Of the Canadian visitors, Ontario represented the largest group (21%) followed by Alberta (18%), BC (12%) and then Quebec (10%). 78% of operators indicated that their Canadian visitors came from several regions in Canada. For those businesses serving a single Canadian origin, visitors from Ontario were the largest group (35%).

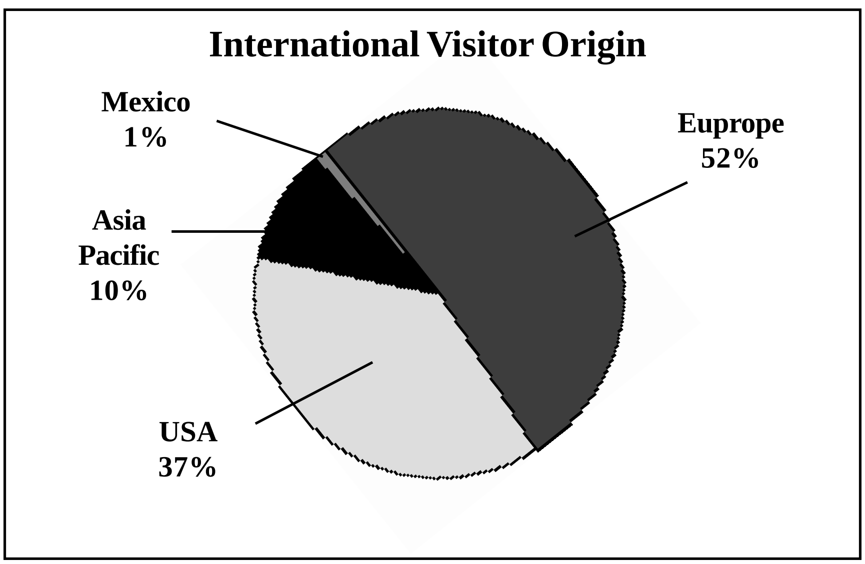
Canadian Visitor Origin

	Number of Responses			Percent		
	Multiple*	Single**	TOTAL	Multiple*	Single**	TOTAL
BC	11	0	11	16%	0%	12%
Alberta	14	2	16	20%	10%	18%
Saskatchewan	8	0	8	12%	0%	9%
Manitoba	5	2	7	7%	10%	8%
Ontario	12	7	19	17%	35%	21%
Quebec	8	1	9	12%	5%	10%
Yukon	1	1	2	1%	5%	2%
Nunavut	2	2	4	3%	10%	4%
Maritimes	8	3	11	12%	15%	12%
- New Brunswick	*2*	*0*	*2*	*3%*	*0%*	*2%*
- Nova Scotia	*3*	*1*	*4*	*4%*	*5%*	*4%*
- Newfoundland	*1*	*2*	*3*	*1%*	*10%*	*3%*
- Prince Edward Isl	*1*	*0*	*1*	*1%*	*0%*	*1%*
- Atlantic	*1*	*0*	*1*	*1%*	*0%*	*1%*
West coast	0	1	1	0%	5%	1%
W Canada	0	1	1	0%	5%	1%
TOTAL	**69**	**20**	**89**	**78%**	**22%**	**100%**

* Multiple indicates the operator's customer base is from more than one province/territory
**Single indicates the operator has only one province/territory market

Numbers may not add to 100% due to rounding

Europeans represent 51% of international visitors followed by the USA at 37%; however, when operators indicated 100% of their international visitors originated from a single country, they almost always came from the USA (93%). USA and Germany were the international countries with the most visitors to Aboriginal tourism facilities while Japan, Switzerland and Italy were also prevalent.

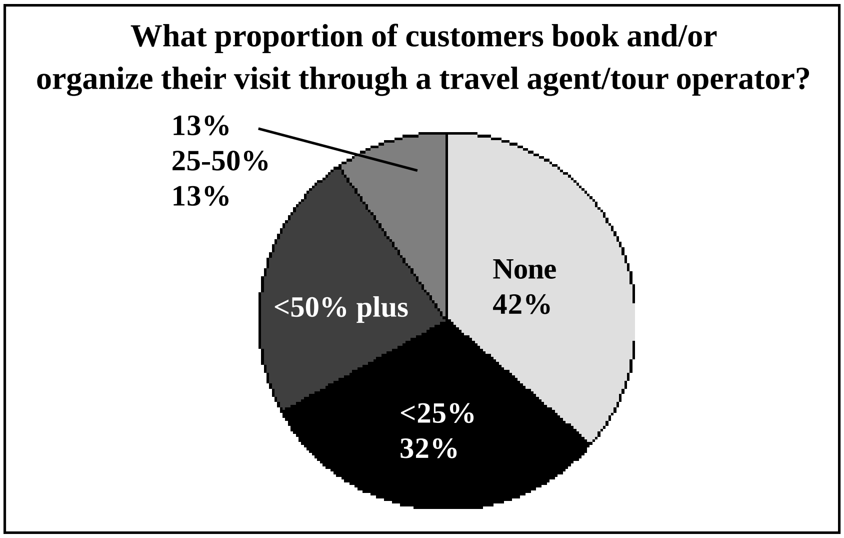


International Visitor Origin						
Source Market	**Number of Responses**			**Percent**		
	Multiple*	**Single****	**TOTAL**	**Multiple***	**Single****	**TOTAL**
USA	**15**	**14**	**29**	**52%**	**48%**	**37%**
*- USA**	*15*	*12*	*27*	*24%*	*80%*	*93%*
- Individual States		*2*	*2*		*100%*	*7%*
Washington		*1*	*1*			
Ohio		*2*	*2*			
New York		*1*	*1*			
Pennsylvania		*1*	*1*			
Michigan		*1*	*1*			
Kentucky		*1*	*1*			
Mexico	**1**		**1**	**100%**	**0%**	**1%**
EUROPE	**39**	**1**	**40**	**98%**	**3%**	**51%**
*- Europe**	*4*		*4*	*10%*	*0%*	*10%*
- Germany	*16*	*1*	*17*	*41%*	*100%*	*43%*
- Switzerland	*4*		*4*	*10%*	*0%*	*10%*
- France	*3*		*3*	*8%*	*0%*	*8%*
- Italy	*4*		*4*	*10%*	*0%*	*10%*
- Spain	*2*		*2*	*5%*	*0%*	*5%*
- Austria	*1*		*1*	*3%*	*0%*	*3%*
- Sweden	*1*		*1*	*3%*	*0%*	*3%*
- Poland	*1*		*1*	*3%*	*0%*	*3%*
- Western Europe	*1*		*1*	*3%*	*0%*	*3%*
UNITED KINGDOM	**2**	**0**	**2**	**5%**	**0%**	**5%**
England	*1*		*1*	*50%*	*0%*	*1%*
Scotland	*1*		*1*	*50%*	*0%*	*1%*
ASIA PACIFIC	**8**	**0**	**8**	**100%**	**0%**	**10%**
- Japan	*5*		*5*	*63%*	*0%*	*63%*
- Australia	*3*		*3*	*38%*	*0%*	*38%*

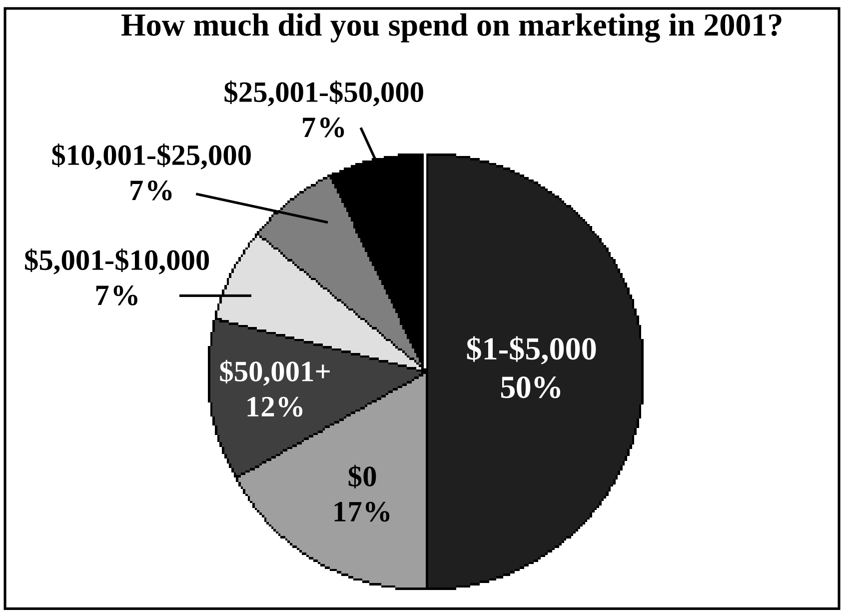
* Multiple indicates the operator's customer base is from more than one country
**Single indicates the operator's customer base is only one country

Numbers may not add to 100% due to rounding

- **What proportion of your customers book and/or organize their visit through a travel agent or tour operator?** (40 responses) – Customers of Aboriginal operators rarely use travel agents and tour operators. In 42% of the operations, the customers did not use a travel agent or tour operator to assist with their travel plans. An additional 28% of operators to a cumulative total of 70% reported that less than 10% of their customers booked or organized their visit with others.



- **How much did you spend on marketing in 2001?** – (42 responses) – Two thirds of operators spent $5,000 or less on marketing in 2001. Of the 42 operators who responded, 26% spent $5,000 on marketing costs while two operators spent $2 million or more. Significantly, 17% of operators did not spend any dollars for marketing.



- **Do you have a marketing plan? For those who do have a marketing plan, do you update it every year?** (47 responses) – 62% of respondents (29 businesses) indicated that they do have a marketing plan. Of those respondents who do have a marketing plan, 79% reported that the plan is updated annually.
- **Do you use any marketing tools?** (46 responses) – 83% of operators are using marketing tools to promote their businesses. The most popular marketing method and the one considered the most effective was Referrals/Word of Mouth. Other forms of marketing found to be effective by at least 50% of respondents include brochures/flyers, travel guides, tourism information centres, trade shows, internet marketing and media relations. While videos were the marketing tool used the least, yellow pages were considered to be the most ineffective with magazine and newspaper ads also being considered unproductive.

	Effectiveness			
		Very Effective	Effective	Ineffective
Referrals/Word of mouth (45/47)	96%	64%	29%	2%
Brochures/Flyers (44/47)	86%	25%	50%	11%
Tourism information centres (45/47)	69%	16%	38%	16%
Trade shows (45/47)	67%	22%	36%	9%
Website/Internet (45/47)	67%	16%	47%	4%
Magazine ads (44/47)	64%	11%	34%	18%
Direct mail (45/47)	62%	16%	38%	9%
Media relations (45/47)	62%	18%	40%	4%
Familiarization tours (45/47)	56%	13%	33%	9%
Yellow pages (44/47)	52%	5%	27%	20%
Newspaper ads (45/47)	49%	9%	24%	16%
Travel guides (44/47)	32%	14%	43%	11%
Videos (44/47)	32%	5%	18%	9%

* Numbers may not add to 100% due to rounding

- **Do you have any marketing partnerships/linkages?** (45 responses) – Partnering in marketing activities is being done by 64% of the Aboriginal operators. The most prevalent partnership or linkage was with a local/regional provincial tourism association (73%) primarily for the purpose of marketing. Partnerships with other Aboriginal tourism businesses are developed for product development and packaging initiatives (56%) while linkages with other non-Aboriginal tourism businesses are for the purpose of marketing (60%). While only 28% engaged in relationships other than those with the mainstream tourism industry, the other linkages were connected for marketing purposes (73%). All of these connections were considered effective achieving roughly an 80-85% rating of effective. Aboriginal tourism associations were considered the least effective even though the connection was mainly for marketing.

		Purpose		Effectiveness	
Partner (responses)		Product Development	Marketing	Effective	Ineffective
Local/regional provincial tourism assn (30)	73%	27%	73%	86%	14%
Other non-Aboriginal tourism businesses (31)	64%	40%	60%	81%	19%
Aboriginal tourism association (30)	57%	35%	65%	78%	22%
Tour Operators/packagers (30)	53%	38%	63%	80%	20%
Other Aboriginal tourism businesses (31)	52%	56%	44%	83%	17%
Other (29)	28%	27%	73%	85%	15%

Numbers may not add to 100% due to rounding

- **How would you rate your overall marketing success during the high and low season?** Generally operators felt their marketing activities were effective. Combined, 88% said their efforts were effective, with 24% rating their efforts very effective and 64% rating them effective. In the low season, 12 % said their efforts were very effective and 63% rated them effective. However, almost one quarter (24%) indicated their marketing efforts in low season did not produce the results they expected.

Season	Very Effective	Effective	Ineffective
High (42 responses)	24%	64%	12%
Low (41 responses)	12%	63%	24%

Numbers may not add to 100% due to rounding

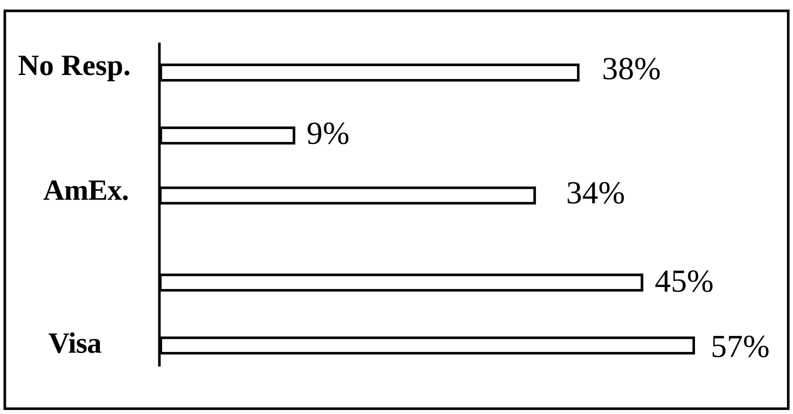
The following questions were asked to develop a sense of the readiness of operators to enter or market to international markets. Operators were asked to indicate if they had the ability to respond to inquiries and provide information by asking whether they had fax and email capabilities, staffing and industry linkages with travel agents and tour operators, and the administration set-up to respond to industry requests.

- **Can you send and receive faxes?** (44 responses) – Fax machines were used by 94% of operators.
- **Can you send and receive emails?** (38 responses) – The ability to send and receive emails was not as prevalent as faxes, but was still high at a level of 81%.
- **Do you have a website?** (47 responses) – Of the Aboriginal tourism operations surveyed, 64% of them had a web presence.
- **Is someone available to take reservations or answer questions about your business within 48 hours on a year-round basis?** (45 responses) – Anyone calling into 93% of the operators can be assured that someone would return their call within 48 hours at any time of the year.
- **Can you take reservations at least two years in advance?** (44 responses) – The ability to accept reservations at least two years in advance was available in 73% of the operations surveyed.
- **Do you market your products internationally through tour operators?** (45 responses) – Almost half (47%) of operators were marketing their products through tour operators.
- **Do you participate directly, or through a tour operator, in U.S./Overseas trade shows?** (45 responses) – One third (15) of the Aboriginal tourism businesses surveyed indicated they are participating directly or are being represented by tour operators in U.S./overseas trade shows. Events they were present at in some manner were for bus companies, hunting and fishing in the USA, and in places like Germany, Italy, Chicago, ITB Berlin, Switzerland and local events.
- **Do you provide net rates or pay commissions to tour operators?** (42 responses) – 48% of operators indicated that they do offer net rates or pay commission to tour operators.
- **Considering factors relevant to your particular business (e.g. your access by tour buses, parking areas, guest accommodation capacity, washroom facilities), what is the largest size of group you can accommodate at one time?** (40 responses) – Most of the operators (38%) were small, only being able to accept group sizes no larger than 25 people. The most frequent group size that the operators (20%) could accommodate was 30. One of the two largest operators reported they could accept group sizes of 5,000 and another said they could handle groups of 1,000.

26 - 50	25%	63%
51 - 85	13%	75%
100 - 250	13%	88%
251 - 500	8%	95%
501 - 1000	3%	98%
>1000	3%	100%
TOTAL	**100%**	

Numbers may not add to 100% due to rounding

- **Which credit cards do you accept?** – (29 responses) – 62% of the operators interviewed indicated that they accepted payments by credit card. Visa was the most popular card accepted with MasterCard being the next.



*NOTE: multiple responses allowed

- **Do you carry liability insurance?** (46 responses) – Insuring for liability is done by 91% of the businesses; however 8% indicated they do not protect their business and customers by carrying liability insurance.

The results show that primary markets for Aboriginal tourism businesses are individuals and small groups. Many of the operators are small, and able to accommodate up to 30 people at a time. Nonetheless, it would seem that most are large enough to be able to accommodate small tour groups, a key requirement if they are to target international tour operators.

While 81% of operators maintained contact with past customers, only 51% of the respondents actually encouraged customer comments through a formal customer response program (i.e. comment card or customer survey). This indicates that operators need to be made aware of the importance of obtaining customer feedback.

Almost all operators indicated they found referral and word-of-mouth marketing to be very effective. Other forms of marketing found to be effective by at least 50% of respondents include brochures/flyers, travel guides, tourism information centres, trade shows, internet marketing and media relations. These results are useful in providing direction to an industry marketing strategy.

A good number of business owners have developed relationships with other Aboriginal and non-Aboriginal tourism businesses, Aboriginal and provincial/regional tourism associations, or tour operators and packagers. Connections with these industry partners were scattered from half to almost three quarters of all businesses for any partner segment. Given that all such partnerships were rated as being effective for marketing and product development purposes, there is certainly a need to promote more of these kinds of partnerships.

Another issue is that partnerships for product development are focused on other Aboriginal tourism businesses. Considering the small number of Aboriginal tourism operations and their experience, more consideration should be placed on forming partnerships with non-Aboriginal operators, especially in the Aboriginal tourism business' operating region. Product development and packaging partnerships should be sought with others that have complementary, and in some cases similar products, and where all partners have strengths that complement the others' strengths, and offset their weaknesses.

Considering that a lack of effective marketing has been identified as an issue by many tourism industry experts, it was surprising that virtually all operators indicated that their high season marketing efforts are effective. On the other hand, the operators surveyed expressed the feeling that their low season marketing activities are largely ineffective. Since many of the operators surveyed are small, with some not spending anything on marketing, greater emphasis should be placed on the importance of marketing, especially where it is related to addressing industry-market trends and how it could contribute to business expansion.

Canada represents 90% of the market for the majority of the operators surveyed while international visitors came mostly from the USA and Germany. Roughly half of the Aboriginal operators were using tour operators to market their product internationally even though the international visitor represented on average 10% of the customer base. This leads to the assumption that many of the operators hope to increase their international presence.

Increasing their international presence requires that operators become export market ready. Indeed, the majority of Aboriginal tourism businesses indicated that they meet some of the basic conditions required to be export market ready. These include having a web site, being able to fax, email, take reservations at least two years out, and to respond to inquiries within 48 hours at any time of the year. Not all businesses, however, could meet these industry minimum standards. Further, less than half of the operators provide net rates or commissions to travel agents or tour operators. This could be due to the Aboriginal businesses' inability to accommodate groups, lack of relationship or contact with agents and operators. Whatever the reason, this finding is problematic in that paying commissions is a mandatory requirement for working with tour operators who target the international markets.

It must be noted that these findings contradict the opinions of many of the travel industry representatives interviewed for this project, indicating that these results must be interpreted with caution.

8.3.4 Financing

Financing is frequently identified as an issue for Aboriginal businesses. Questions were asked to determine where Aboriginal tourism businesses obtained their start-up financing and how much debt financing they currently carry.

- **When you first started your business, what percentage of your start-up financing was:**
  - **your own equity?**
  - **government or non-repayable grants?**
  - **Aboriginal-controlled/owned financing?**
  - **conventional financing (e.g., bank, credit union loans and/or lines of credit)?**

  Respondents were asked to provide information on the sources of funds used to start up their businesses. Of those owners (32 responses) who were able to answer this question, the results show that well over half (63%) contributed their own equity for 50% or more of the funds required to start their businesses. More than one in four (44%) provided equity contributions equal to 100% of their start-up requirements.

Equity	Percent
0 – 24% equity	22%
25 – 49% equity	19%
50 – 74% equity	19%
100% equity	44%

Numbers may not add to 100% due to rounding

With regard to other sources of start-up financing, the results show that the most commonly used source is government/non-repayable grants. Forty-seven percent (15 respondents) received some form of government/non-repayable grant, with 54% of these receiving 50% or greater of their start-up financing from this source. Twenty-eight percent (9 respondents) used conventional financing sources, with 22% obtaining 60% or more of start-up financing from a bank or credit union. Only 19% (6 respondents) received start-up financing from Aboriginal-controlled/owned sources. Of those, 50% received half or greater of their start-up funds from this source.

Sources of Start-up Funding - % of Total Start-up Funds		
Government/Non-repayable Grants (15 responses)*	**Aboriginal-controlled/ owned financing (6 responses)***	**Conventional Financing (9 responses)***
20% - 1 respondent		
25% - 1 respondent	10% - 1 respondent	20% - 3 respondents
30% - 3 respondents	15% - 1 respondent	25% - 2 respondents
40% - 2 respondents	25% - 1 respondent	30% - 1 respondent
50% - 4 respondents	50% - 2 respondents	33% - 1 respondent
60% - 1 respondent	60% - 1 respondent	60% - 1 respondent
100% - 3 respondents		70% - 1 respondent

* Percent refers to percent of total start-up financing coming from this source

- **Currently, what percentage of your business is financed by your own equity?** (25 responses) – Eighty-four percent of respondents said that 50% or greater of their business is equity financed, with 72% saying that their equity represents 75% or greater of total financing and more than one half (52%) whose businesses are 100% equity financed.

Equity	Percent of Respondents
0 – 49% equity	16%
50 – 74% equity	12%
75 - 99% equity	20%
100% equity	52%

* Numbers may not add to 100% due to rounding

Summary Financing Results

The results indicate that Aboriginal tourism businesses are heavily reliant on their own equity as a source of financing, both for initial start-up and current financing needs. This reliance on personal equity and the relatively low percentages of owners who secured either conventional financing or Aboriginal-controlled financing suggests that business owners may be finding it difficult to secure debt financing. This is a problem common to small businesses generally.

The very low percentage (19%) of business owners who have secured Aboriginal-controlled debt financing suggests one of two things. First, it suggests that Aboriginal Capital Corporations (ACC) may be reluctant to lend to tourism businesses, perhaps because they are seen as being too risky. Second, the problem could be that is a lack of awareness among Aboriginal tourism business owners of the existence of ACCs as a source of business financing. Further research could reveal whether either of these potential causes is relevant.

The results also indicate that a significant number of Aboriginal business owners have received grants for business start-up purposes. This finding indicates that such grants are a key factor enabling Aboriginal entrepreneurs to start tourism businesses.

8.3.5 Sources of Support

These questions looked at the extent to which Aboriginal tourism businesses received support from their communities and government and non-government organizations.

- **Did/does your business receive support from your community (e.g., band, tribal council)?** (47 responses) – About 60% of business owners said they received financial or other support from their community. Of those who receive non-financial support, 54% said the success/growth of their business is identified as a goal of community development plans and 14% receive business planning and management support. Of those who receive financial support, 21% receive support for capital expenditures and 29% receive support in areas such as marketing or operating funds.

Type of Support	Percent
Success/growth of business is included as a goal of community development plan, community economic development plan or tourism development plan	54%
Other financial support (e.g., marketing funds, operating funds, etc.)	29%
Capital expenditures support (e.g., for equipment purchase, building construction)	21%
Business planning and management support (e.g., economic development officer provides assistance, business mentorship program)	14%

Note: multiple responses allowed

- **Did/does your business receive assistance any other government or non-government organizations or associations?** (46 responses) – Only 20% of business owners (9 businesses in total) said they received assistance from a non-community organization or association. Of those who receive such support, five have had support from the federal government (Aboriginal Business Canada), one from a territorial government and the other four from a mix of sources, such as a tourism or seniors association.

Summary Sources of Support Results

The results indicate that a majority of business owners receive some form of support from their communities, but that relatively few businesses have obtained assistance from non-community organizations or associations. This finding contradicts the beliefs of many, who believe that virtually all Aboriginal businesses have received funding from provincial/territorial or federal governments.

8.3.6 Solutions

Aboriginal business owners/managers were asked to provide input into the types of training and assistance that could help to improve the performance of their operations. They were asked to provide priority rankings for a variety of types of training for owners/managers and for employees as well as for several types of marketing assistance. The results of these questions are summarized in the tables in this section, which display the highest to lowest priority rankings based on totalling the high and medium rank priority percentages.

In the case of training for owners/managers, nearly all of the training types were rated as being high-medium priorities. The highest priority clearly is accounting/bookkeeping training at 80% (57% high, 23% medium priority). Business planning/management and technology/computers follow closely as second highest priority training areas, each with a combined high-medium percentage of 76%. Marketing/promotion training received a third place high-medium percentage combined ranking (75%), however this type of training received the highest high priority percentage overall (61%).

Several other training types for owners/managers received high-medium percentages of about 60% or greater. These were leadership (67%), maintenance (65%), cultural interpretation (63%), first aid (63%) and customer service/frontline (59%) training. Tour guide (44%) and outdoor guide (41%) were the only two training types that received combined percentages of less than 50%.

Combined*	Priority Ranking** (%)			Training Desired
	High	Medium	Low	Owner Training (responses)
80%	57%	23%	20%	Accounting/bookkeeping (46)
76%	54%	22%	24%	Business planning/management (46)
76%	50%	26%	24%	Technology/computers (46)
75%	61%	14%	25%	Marketing/promotion (44)
67%	41%	26%	33%	Leadership (46)
65%	41%	24%	35%	Maintenance (46)
63%	48%	15%	37%	Cultural interpretation (46)
63%	46%	17%	37%	First Aid (46)
59%	52%	7%	42%	Customer Service/Frontline (46)
44%	23%	21%	57%	Tour Guide (44)
41%	18%	23%	59%	Outdoor Guide (44)

* Combined refers to total of high and medium rank percentages
** Numbers may not add to 100% due to rounding

Training priorities for employees are very different from those required for owners/managers. Customer service/frontline training is ranked first, with a combined high-medium percentage of 82% (68% high, 14% medium priority). Training types receiving combined percentages of about 70% or better are leadership (77%), technology/computers (76%), maintenance (74%), first aid (72%), business planning/management (70%), cultural interpretation (70%), accounting/bookkeeping (70%) and marketing/promotion/sales (68%). Similar to the results for owner training, outdoor guide (38%) and tour guide (36%) were the only two types of training rated as being of relatively low priority.

Combined*	Priority Ranking** (%)			Training Desired
	High	Medium	Low	Owner Training (responses)
82%		14%		Customer Service/Frontline (43)
77%		26%		Leadership (43)
76%		26%		Technology/computers (42)
74%		30%		Maintenance (43)
72%		19%		First Aid (43)
70%		16%		Business planning/management/supervising (43)
70%		16%		Cultural interpretation (43)
70%		21%		Accounting/bookkeeping (43)
68%		21%		Marketing/promotion/sales (43)
38%		12%		Outdoor Guide (42)
36%		10%		Tour Guide (42)

* Combined refers to total of high and medium rank percentages
** Numbers may not add to 100% due to rounding

When it comes to the marketing assistance desired by owners/managers, all of the types of assistance received combined high-medium priority percentages of over 75%. Creating linkages with other businesses is the highest ranked marketing assistance priority with an 89% (68% high, 21% medium priority) combined percentage. Marketing/planning management was ranked second, with a combined percentage of 86%. Product development/packaging received a somewhat lower combined percentage (81%) than marketing, but a larger proportion of owners rated it a high priority (66% vs. 58%). Understanding market needs and expectations (81%) and cooperative marketing programs (76%) likewise received high combined percentages.

Combined*	Priority Ranking** (%)			Assistance Desired
	High	Medium	Low	Marketing assistance (responses)
89%	68%	21%	11%	Creating linkages with other businesses (47)
86%	58%	28%	15%	Marketing planning/management (47)
81%	66%	15%	19%	Product development/packaging (47)
81%	51%	30%	19%	Understanding market needs and expectations (47)
74%	56%	18%	27%	Cooperative marketing programs (45)

* Combined refers to total of high and medium rank percentages
** Numbers may not add to 100% due to rounding

Summary Solutions Results

The results clearly show that Aboriginal tourism owners/managers see a range of training and marketing assistance options as priorities for improving sector performance. These results are very much in keeping with the opinions of industry experts and observers, and indicate a clear need for a training and marketing assistance strategy geared specifically to the Aboriginal tourism industry.

9. Summary of Research Findings

The research undertaken for this project has been wide-ranging, involving interviews with the regional Aboriginal tourism associations, key informants, selected tour companies, representatives of Aboriginal Business Canada (ABC) and Parks Canada, and economic development officers (EDOs), as well as an extensive literature review and case studies. A summary of research findings is presented in this section, organized as follows:

- the perspectives of stakeholders involved in Aboriginal tourism across the country;
- an integration of findings into the key areas related to Aboriginal tourism constraints, potential and opportunities; and
- conclusions.

The intent is to synthesize the research findings and identify directions that ATTC could take to respond to the challenges and opportunities facing the Aboriginal tourism sector.

9.1 Stakeholder Perspectives

A summary of findings from the various stakeholder groups is provided below. The research results by stakeholder groups are organized generally into a discussion of demand trends for Aboriginal tourism, constraints, opportunities and suggestions for an Aboriginal tourism strategy.

9.1.1 RATA Interview Results

Ten regional Aboriginal tourism associations (RATAs) were interviewed to gather their perspectives on the development of the Aboriginal tourism industry and recommendations on future expansion of the industry. The interviews did not include any representation from the Maritimes (there are no RATAs or similar organizations in place in this area) nor a RATA representative from Saskatchewan. In the case of Saskatchewan, however, an interview was conducted with a representative of the Saskatchewan Planning Committee charged with establishing a RATA.

The RATAs report a growing demand for Aboriginal experiences, particularly Pow wows (including festivals and events), learning experiences, outdoor adventure with some cultural interpretation, and related products. Issues and constraints for Aboriginal tourism identified by RATAs included:

- the fact that the RATAs' support infrastructure itself is insufficient and underfunded;
- a lack of tourism expertise in the Aboriginal community, leading to inconsistent products and ineffective marketing; and
- in several cases, the absence of support on the ground for tourism activities from local or nearby communities.

The RATA representatives point to a common and consistent theme for Aboriginal tourism product and service opportunities – enhanced interpretive services tied to products that may range from Aboriginal cuisine to guided soft adventure and festivals and events. They also noted a need to incorporate tourism experiences offered by Aboriginal communities into existing tour operator packages and to foster linkages with existing operators.

RATA representatives see an Aboriginal tourism strategy as requiring the following components:

- standardized services offered by the RATAs as part of their standard support infrastructure;
- a long-term and consistent funding approach;
- significantly enhanced marketing;
- enhancing the understanding of and support for the tourism sector,
- the promotion of Aboriginal involvement at all levels in the tourism sector;
- an international presence for Aboriginal tourism; and
- much enhanced advocacy of Aboriginal tourism issues on the part of ATTC.

9.1.2 Tour Companies

Interviews were held with 14 Canadian, U.S., European and Japanese tour operators. These were operators which either offer Aboriginal tourism product, focus on a source market known to be important for Aboriginal tourism, and/or were recommended by ATTC or the Canadian Tourism Commission. Included in the interviews were two Aboriginal-owned tour companies: Moccasin Tours, owned by the Northern Ontario Native Tourism Association and Tours Innu, owned by the Quebec Aboriginal Tourism Association (STAQ).

The tour companies observe similar trends to RATA representatives, reporting a growing demand for learning experiences, Aboriginal tourism products associated with nature-based tourism, and increased mainstream interest in Aboriginal tourism. This is premised in part on an increased cultural awareness and concern about other cultures.

More market-oriented in their perspective on Aboriginal tourism issues and constraints, tour companies emphasized that there was a lack of market-ready and export-ready product to incorporate into their packages. Underlying this problem are suggestions that there is also a lack of understanding about market expectations, pricing issues, quality issues and about what it takes to market to the international travel trade. They note too that marketing on the part of regional, provincial and national agencies is not well developed as it relates to Aboriginal tourism.

In terms of tourism product opportunities, tour operators point to mainstream market development and partnering as key strategies, in addition to developing experiential/ learning in cultural tourism products. In particular, they emphasized the need to provide easily accessible products and services (i.e., urban-based) for mainstream markets. Suggestions on the part of tour companies for tourism development strategies are related to the normal activities that tour operators require in order to effectively package tourism product, including:

- more information on the product;
- strengthened DMO sales kits;
- databases of collateral materials and market-ready products;
- increased visibility at trade shows; and
- central web site with information on Aboriginal tourism activities, products and including an on-line booking and reservation system.

9.1.3 Key Informant Interviews

Key informants included representatives of ATTC, CTC, Parks Canada, the ex-chair of the former Canadian National Aboriginal Tourism Association (the predecessor to ATTC).

The key informants also report increased demand for experiential and learning tourism, as well as authentic experiences and multifaceted experiences. They see a mainstreaming of special interest tourism, mirroring the comments made by tour companies.

In terms of issues and constraints, key informants demonstrated particular concern about conflicts between tourism and social priorities, land-related issues, and cultural conflicts. These, in their view, are not rationalized well enough in many cases. In addition, they, like the RATA representatives, point to a lack of capacity in an emerging and somewhat fragmented tourism industry as a problem for sustainability. They suggest that lack of access to normal business infrastructure such as business management training, hospitality training, financing and marketing all contribute to issues that must be addressed.

In terms of Aboriginal tourism product, key informants suggest that there should be more orientation toward non-capital intensive products and services, integrating cultural tourism into experiential and learning tourism, and interfacing with national parks and historic sites in terms of interpretation and educational programs. They believe that all of these areas merit investigation as potential product and service opportunities. Like other stakeholder groups, they confirm the general need for more interpretation and a greater orientation towards learning experiences.

Their perspective on what might be included in an Aboriginal tourism development strategy focused more on support infrastructure than other stakeholder groups. This included strengthening the capacities of RATAs, establishing a comprehensive industry development strategy, increasing the distribution of product information to the travel trade and development of an Internet site for product and destination information.

9.1.4 Literature Review Results

The literature review included all relevant existing and current Aboriginal tourism-related reports and documents. This included primary market research conducted through the Canadian Tourism Commission as well as various Aboriginal tourism product studies and market studies based on secondary data.

In the case of Aboriginal tourism trends, the literature review confirmed the perspectives of those interviewed (as described above). They noted trends towards nature and eco-based products with an outdoor/recreation orientation, active, learning and natural entertainment combination experiences, and cultural experiences.

In the case of Aboriginal tourism issues and constraints, the literature review also found similar issues in the area of education and training, marketing, funding and management. In addition, the literature review results identified image and attitude constraints as a problem together with apparent constraints on the development of partnerships. The image constraints reported were negative labour force attitudes, a negative image of Aboriginal people, and concern over cultural integrity.

The literature reveals a plethora of tourism product and service opportunities within the following general categories:

- accommodation;
- Aboriginal-themed food and beverage service;
- attractions;
- tourism packages;
- festivals and events;
- tourism support services; and
- national parks and historic sites related activities.

They note a full range of opportunities which, properly matched to the market, can significantly strengthen the Aboriginal tourism sector in Canada.
The literature review also confirmed the interview findings related to tourism development strategies for Aboriginal tourism. In this case, however, the literature review results indicated that there should be more emphasis on image and attitude programs related to Aboriginal tourism and on strategies to overcome partnership constraints.

9.1.5 ABC/INAC/EDO Interviews

Interviews with representatives from Aboriginal Business Canada (eight interviews), Indian and Northern Affairs (four interviews) and economic development officer representatives (eight interviews) focused on capacity and readiness issues related to Aboriginal tourism. The findings tended to complement the perspectives of other stakeholder groups but were more focused in their orientation towards issues and constraints. This included observations that community commitment was a problem with several dimensions:

- a general lack of awareness of the economic, social and cultural benefits of tourism;
- the view that tourism is a cultural “sellout”;
- the failure of community leaders to provide political support for tourism; and
- the failure of communities to separate business and politics.

They also repeated the observations made by other stakeholder groups concerning constraints in the human resources and training area, product development and marketing. Representatives from these organizations provided a comprehensive range of recommendations addressing each of the constraint areas described above. Particular emphasis was placed on strong community awareness programs and programs to develop support for tourism “on the ground,” together with a stronger focus on entrepreneur and related training for the tourism sector in Aboriginal communities. This included not only

training programs and mentorship/coaching but also joint ventures and partnerships with non-Aboriginal partners for skills development purposes.
The perspective of representatives from these agencies on product and market development were similar to other stakeholder groups. They did reference technology-related constraints as an issue and suggested the key strategy will be to promote technology and Internet marketing training throughout Aboriginal tourism communities.

9.1.6 Operator Interviews

A supplemental survey was administered to Aboriginal tourism business owners/ managers, conducted as part of the economic impact assessment, a component of this project. Extracts relevant to this summary of stakeholder perspectives for the sector generally are provided below.

The operator interviews focused on tourism development strategies that should be pursued by the Aboriginal tourism sector. Their priorities were clear and focused:

- more owner training (in areas ranging from business planning and management to accounting/bookkeeping and marketing, technology and leadership);
- enhanced employee training (ranging from hospitality and skills development to maintenance and first aid); and
- greater marketing assistance for operators (ranging from a better understanding of market needs and expectations to partnerships and linkages, market planning and management and product development and packaging).

The operator interviews reveal that their own perceptions of shortfalls in their businesses and business practices are essentially the same as those recorded by the various stakeholder groups and the results of the literature review.

9.2 Synthesis of Research Findings

There was significant consensus among all stakeholder groups concerning various aspects of the Aboriginal tourism sector. In order to provide a sound context for considering the way forward, a synthesis and integration of the research results has been made using the following key areas of inquiry:

- Aboriginal tourism trends;
- Aboriginal tourism issues and constraints;
- Aboriginal tourism product and service opportunities; and
- Tourism development strategies.

The findings have been summarized in **Exhibit 9.1** by each of these key areas of inquiry. The research results have identified several underlying themes for which there is a consensus amongst stakeholders. These have served to frame the conclusions and recommendations and they include the following:

Exhibit 9.1: Summary of Research Findings

ABORIGINAL TOURISM TRENDS

Literature Review	RATA Interviews	Tour Company Interviews	Key Informant Interviews
Relevant trends include: · Short-Haul Markets - Seek nature and eco-based active/recreation/ outdoor oriented products · Long-Haul N. American Markets - Seek active, learning, natural and entertainment combination experiences · Long- Haul Overseas Markets - Seek sightseeing, recreation and cultural combination experiences	Growing demand for: · Pow Wows, festivals and events · Outdoor adventure – soft with cultural interpretation · Traditional accommodations · Experiences located in Aboriginal communities · Learning experiences involving food, arts and crafts, story, language, history General and protocol information on Aboriginal culture	Relevant trends include: · Growing demand for learning and experiential travel · Growing demand for nature-based tourism · Increased environmental and cultural awareness and concern · Mainstreaming of interest in Aboriginal tourism	Relevant trends include: · Increased demand for experiential and learning tourism, cultural tourism, ecotourism and soft adventure · Increased demand for authentic experiences · Increased demand for multi-faceted experiences · Increased demand for short duration experiences · Mainstreaming of special interest tourism · Aboriginal baby boom creating labour pool · Events of 9/11 impacting travel

ABORIGINAL TOURISM ISSUES AND CONSTRAINTS

Literature Review		RATA Interviews	Tour Company Interviews
· Information, Education, Training Constraints - Lack of awareness of benefits of tourism - Lack of knowledge of available business development programs/ services - Lack of business skills - Lack of customer care/hospitality training · Marketing Constraints - Fragmented/weak marketing - Lack of marketing skills and resources - Limited understanding of market - Limited awareness of products by market · Funding Constraints - Lack of funding for tourism entrepreneurs - Limited awareness of funding sources	· Image and Attitude Constraints - Negative labour force attitudes - Negative image of Aboriginal people - Product quality and authenticity concerns - Concern over cultural integrity · Partnership Constraints - Limited understanding of possible partnerships - Lack of collaboration between Aboriginals and non-Aboriginals - Lack of collaboration between Aboriginal operators/ communities - Little involvement in provincial tourism associations	· Lack of/uneven support for sector by federal, provincial and Aboriginal governments · Government funding criteria/ application approval cycles not suitable for tourism · RATA resources insufficient to meet service demand · Low quality product offerings and operations · Poor community maintenance · Lack of awareness of available products · Inconsistent product delivery · Poor hospitality and management practices · Lack of appropriate marketing tools · Lack of understanding of Aboriginal tourism sector by tourism industry	· Lack of understanding of market expectations · Product quality issues, ranging from poor maintenance and housekeeping to inconsistent and unreliable product delivery, lack of customer service and professionalism and lack of authenticity · Lack of market-ready and export-ready product packages · Much of the available product is too far from gateway cities and major routes · Products often not priced competitively · Lack of market awareness of available products · Federal, provincial and Aboriginal DMOs fail to package or promote Aboriginal tourism well · Lack of understanding of packaging for and marketing to international travel trade

ABORIGINAL TOURISM ISSUES AND CONSTRAINTS (continued)		
ABC/INAC/EDO Interviews[1]	**Key Informant Interviews**	**Operator Interviews**
· Community Commitment Constraints - Lack of awareness of economic, social and cultural benefits of tourism - Many view tourism as a cultural sell-out - Failure of community leaders to provide tangible and political support for tourism development - Failure of communities to separate business and politics · Culture-Related Constraints - Failure to recognize and capitalize on market potential for cultural tourism · HR-Related Constraints - Lack of business and customer service training - Lack of awareness of available business development and training programs - Training programs don't address cultural appropriateness/geographical obstacles · Product/Market Development-Related Constraints - Lack of understanding of markets - Lack of access to industry and marketing information, and of awareness of available information - lack of understanding of product quality issues, product development and packaging techniques, and marketing techniques - Limited funding availability, inappropriate funding criteria and lack of awareness of available funding · Technology-Related Constraints - Training required on the use of technology for operational and funding purposes	· Tourism competes with basic social priorities · Unresolved land-related issues · Lack of understanding of tourism development opportunities and markets · Tourism seen as a cultural "sell-out." · Consumers' lack of understanding creates unrealistic product and service expectations · Industry is immature and fragmented · Lack of management capacity · Lack of capacity among EDOs to guide tourism development · Lack of business management support · Lack of education and training · Difficulty in obtaining funding and financing · Ineffective industry marketing · Reluctance to partner with non-Aboriginal tourism associations and operations	· Difficult to find appropriately skilled staff · Improvements required in human resource training and management · Most operators can only accommodate small groups of 30 or fewer · Customer feedback collection needs be improved · Fax and email communication needs to be improved · Heavy emphasis on word-of-mouth marketing · Marketing planning with annual updating inconsistent/irregular · Few relationships with travel agents and tour operators · Low season marketing is ineffective · Product development and packaging is concentrated to Aboriginal product · Net rates and commissions rarely offered · Not all operators have liability insurance · Appears to be heavy reliance on equity financing

[1] Refers to interviews conducted for Capacity and Readiness Survey

ABORIGINAL TOURISM PRODUCT and SERVICE OPPORTUNITIES			
Literature Review	**RATA Interviews**	**Tour Company Interviews**	**Key Informant Interviews**
· Accommodation: - Backcountry Aboriginal-themed wilderness lodges - Eco-lodges - Campgrounds with tepees - Aboriginal-themed resort lodges - Aboriginal-themed B&Bs · Aboriginal-themed F&B services: - Sit-down restaurants or tea rooms - Fast-food or take-out restaurants - Catering services - Traditional feasts · Attractions: - Historic galleries and museums - Cultural galleries, museums and interpretive centres - Archaeological sites - Interpretive and/or historic parks or trails - Casinos - Monuments - Reenactive and/or interactive traditional villages - Traditional healing retreat centres - Craft development centres or display centres - Souvenir/gift shops · Tours and packages: - Cultural interpretation tours - Nature tours - Outdoor adventure/ recreation tours - Sport hunting or fishing tours - Survival or trap-line tours - Tour routes (e.g. self-guided, mapped, interpretive) - Community tours - Ethnobotany or herbology tours · Festivals and events: - Traditional Pow Wows - Aboriginal celebration days - Historic celebrations - Conferences - Sports competitions - Nature festivals · Tourism Support Services: - Transportation-related services - Laundry facilities - Sporting supplies - Convenience/grocery store - Conference facilities - Recreation services · National Parks and Historic Sites Related: - Generally as per other categories	· Products that meet interests and needs of seniors markets · Soft adventure · Cuisine tourism – restaurants and packaging · Arts and crafts – demonstrations as a package or tour, retail · Guided/ interpretive experiences for educational or business purposes · Guided/ interpretive services for non-Aboriginal operators · Interpretive services at significant sites off-reserve (i.e. parks, heritage sites) · Festivals and events Experiences that can be incorporated into existing tour operator packages or businesses	· Learning and experiential tourism products · Eco-cultural tourism products · Catering to mainstream markets (i.e., urban-based, easily accessible products and services) · Partnering – with other non-Aboriginal tourism operators to create multifaceted packages	· Special interest tourism products – Aboriginal learning tourism products; layering cultural tourism onto experiential and learning tourism and cultural tourism products · Non-capital intensive products and services (e.g., providing interpretation/ catering services to other tourism businesses) · Aboriginal-themed accommodation, food & beverage, meeting facilities · National parks and historic sites related – interpretation and education programs, concessions, non-park services complementing park programs

ABORIGINAL TOURISM DEVELOPMENT STRATEGIES			
Literature Review		**RATA Interviews**	**Tour Company Interviews**
· RE Info, Education, Training Constraints - Initiatives to educate entrepreneurs and communities about benefits of tourism - Initiatives to disseminate information about available assistance - Initiatives to encourage entrepreneurs to undertake training for themselves and employees · RE Marketing Constraints - Provide tourism business marketing training - Provide resources (e.g., websites, marketing organizations, funding for collaborate marketing) - Collect and disseminate market info - Develop and implement comprehensive domestic and international marketing campaign · RE Funding Constraints - Increase funding and improve application and funding processes - Initiatives to raise awareness of available funding	· RE Image and Attitude Constraints - Image campaign to position tourism as a worthwhile career option - Campaign to improve cross-cultural congeniality - Manage consumer expectations by pre-trip distribution of information about destination and culture and authenticity of experience - Development of tourism development guidelines and restrictions by individual communities · RE Partnership Constraints - Disseminate information on benefits of partnerships and networks - Encourage collaboration between Aboriginal and non-Aboriginal businesses and communities - Encourage non-Aboriginal tourism associations to incorporate more Aboriginal product into product portfolios and promotional material	· Services - Standardize services offered by RATAs · Funding - Develop a coordinated, long-term, accountable approach across provinces/ territories to adequately support RATAs · Marketing - Develop regional directories and national directory of export-ready products and services - develop national product quality standards - standardize RATA websites · Promote Aboriginal Involvement - Develop national tourism awareness campaign · Developing an International Presence - Promote export-ready businesses through a “Canada Aboriginal Pavilion” at international trade shows · Advocacy - ATTC advocacy of Aboriginal tourism issues	· Provide tour operators with more information · Include more information in DMOs’ sales kits · Develop database of digital materials for collateral materials production · Develop database of available market-ready product · Provide additional marketing and marketing support · Increase visibility of product at consumer and industry trade shows and in the media · Provide more opportunities for first-hand learning (e.g., fams, seminars, workshops) · Develop central web site with info on Aboriginal news, history and product information, and online booking and reservations

ABORIGINAL TOURISM DEVELOPMENT STRATEGIES (continued)

ABC/INAC/EDO Interviews[1]		Key Informant Interviews	Operator Interviews
· RE Community Commitment Constraints - Develop and implement tourism awareness programs · RE Culture-Related Constraints - Raise awareness of demand for authentic cultural tourism experiences - Encourage communities to decide which aspects of culture to share - Work with DCH, CTC and provincial heritage and tourism organizations to establish product development and marketing programs · RE HR-Related Constraints - Raise awareness of importance of business and customer service training - Develop database of available programs - Provide culturally appropriate customer service training - Provide entrepreneur-focused business training - Provide mentorship, coaching and internship programs - More distance training options, combined with live-instructor training - Provide distance support services - Encourage joint ventures and partnerships with non-Aboriginal partners for skills development	· Re Product/Market Development Constraints - Raise awareness of importance of product and market development training - Develop database of resources - Disseminate information on product and market trends and characteristics - Publish best practices - Development of regional tourism resource inventories - Provide product development and packaging and marketing training - Encourage partnerships with non-Aboriginal partners - Develop stronger linkages with non-Aboriginal tourism associations - Link Aboriginal tourism marketing strategies to regional, provincial and national tourism marketing strategies - Develop product development financing mechanisms · Technology-Related Constraints - Raise awareness of importance of technology - Provide technology and Internet marketing training - Develop regional/national Internet initiatives	· Provide tourism awareness programs to all interested communities · Strengthen capacity of RATAs to develop their leadership role and their responsiveness to the Aboriginal tourism sector · Lessen the RATAs' dependency on government funding and expand the resources available by broadening the revenue base · Develop comprehensive Industry development strategy covering product development, human resource development and market development · Increase distribution of product information to travel trade by national and provincial destination management organizations, including RATAs · Development of sales tools including databases of photos, brochures, product summaries and other product materials · Develop an Internet site providing comprehensive product and destination information	· High priorities for owner training: - Accounting/bookkeeping - Business planning/ management - Technology/computers - Marketing/promotion - Leadership · High priorities for employee training: - Customer service/frontline - Leadership - Technology/computers - Maintenance - First aid · High marketing assistance priorities: - Creating linkages with other businesses - Marketing planning/ management - Product development/ packaging - Understanding market needs and expectations - Cooperative marketing programs

[1] Refers to interviews conducted for Capacity and Readiness Survey

1. *Market Trends* – The market is generally trending towards greater interest in experiential products and experiences. This growing demand includes increasing interest in Aboriginal tourism products when related to 'learning & enrichment' experiences or included as a half- or full-day component of a multi-day touring itinerary as well as other forms of special interest tourism, such as ecotourism, adventure tourism and cultural tourism. Aboriginal tourism has great potential in all of these areas, whether as a stand-alone product or "layered" onto non-Aboriginal tourism product offerings. Clearly, this growing demand includes increasing international interest in Aboriginal tourism products. At the same time, domestic tourism markets are often forgotten in developing marketing strategies and must be included in the mix.
2. *Aboriginal Tourism Constraints* – While opportunities abound for the development of additional tourism product and market trends are clearly positive for this investment, there continue to exist major capacity issues in offering market-ready products. The industry is largely typified by small enterprises, many of which do not have sufficient tourism market awareness, business skills, product development and marketing expertise to successfully compete in the marketplace. This situation is an important issue for Aboriginal tourism product in gateway cities, but even more serious in remote and more rural areas. Other key and closely related constraints are a lack of market-ready product and of access to financing.
3. *Aboriginal Tourism Industry Support Programs* – The RATAs have been created to work with Aboriginal tourism entrepreneurs and communities to develop and market Aboriginal tourism product. For the most part, the RATAs lack sufficient capacity to be effective. While discernible and positive progress has been made in Ontario and Quebec, for the most part the RATAs have not been able to deliver on the intended objective of strengthening and growing the Aboriginal tourism sector. This lack of capacity means that RATAs cannot effectively address issues constraining growth, which are typically summarized as a lack of awareness within Aboriginal communities of the social, cultural and economic benefits of tourism, as well as an absence of marketing resources, product that is not market ready, difficult and challenging access to financing and lack of business skills. In all of these areas, institutional capacity must be strengthened to assist existing and potential Aboriginal tourism entrepreneurs to develop competitive product.
4. *Aboriginal/Non-Aboriginal Tourism Partnerships* – There is a general and pervasive attitude that Aboriginal tourism product must partner with other Aboriginal tourism products and not with the non-Aboriginal travel trade. This attitude must be overcome if Aboriginal tourism product is to thrive in the marketplace. There are many reasons for this attitude, including a lack of understanding between the two stakeholder groups, distrust concerning product delivery, and the like. Notwithstanding these issues, any successful Aboriginal tourism growth strategy will need to successfully challenge and overcome this perception.

The Core Issue is the Aboriginal Tourism Product – Without market-ready product, all else fails in a tourism growth strategy. In general, there is a lack of market-ready product in the Aboriginal tourism sector, and particularly for products and services located in or near gateway cities and near major tourism routes. There are notable exceptions, but for the most part the product simply does not meet domestic and/or international market expectations in areas such as duration, authenticity, quality and price. Therefore, any strategy must emphasize product development and upgrading as a cornerstone. This is not to say that market issues are any less a priority. Investment in successful product also means that the market channels and linkages must be put in place at the same time in order to ensure that the product, once offered, will be a success.

Too often, one encounters programs focused on training/product development in tourism without any attention to the market. All of the good work and progress that is made in the product area will come to naught if parallel attention has not been paid to ensuring that it gets to market successfully, and at prices that ensure viability.

9.3 Conclusions

The research results point to a positive future for Aboriginal tourism in spite of the many issues and constraints identified by various stakeholder groups. There is clear consensus among all stakeholders that growth potential is significant and can be attained with programs to address the issues and constraints. Given this level of market potential demonstrated through the research, there is no reason not to pursue a more aggressive approach to growing the Aboriginal tourism sector.

It is also clear that a national vision and approach is necessary to foster growth in the Aboriginal tourism sector. Markets, both international and national, are key to this process. The travel trade serving these markets have a national perspective and are seeking to package "Aboriginal product in Canada," whether it be for their domestic clientele or for international clientele. Therefore some consistency in distribution channels, marketing approaches, and product standards will be required to enhance the positioning of Aboriginal tourism product for both domestic and international markets.

The travel trade has also observed that more product is required for mainstream markets. This implies ready access in urban areas which receive the majority of tourism activity on an annual basis in Canada. This offers an important strategy for growing the sector and provides a venue for increasing interest in Aboriginal tourism product and introducing product in more remote areas.

Finally, a national initiative and perspective will help to facilitate partnerships for the sector. This can be supported at a national level through programs ranging from web site information to coordination and organization for trade show participation by Aboriginal tourism operations and entities from regions and local communities.

With that perspective in mind, it is clear that activity at all levels (from local to national) is important to advance the development of the Aboriginal tourism sector.

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Appendix 1

Markets Suited to Canadian Aboriginal Tourism Development

Table 1. Incidence of Activity Segments in Canada*

Any Outdoors/Culture (Wide Net)	71%
Any Soft Adventure	65%
Any Hard Adventure	49%
Fishing	22%
Hunting	5%
Any Culture/Learning	41%
Any Aboriginal Culture	6%
Aboriginal Culture/Outdoors (Dual Track)	6%

*Based on previous or proposed future participation.
Source: TAMS 2000

Table 2. Aboriginal Cultural Activities on Trips in Past 2 Years

Preferred Activities	High Potential	Any Potential	All Travellers
Aboriginal attractions	67%	61%	9%
Aboriginal experiences in remote setting	52%	53%	8%
Aboriginal celebrations	26%	30%	4%

Any potential = travellers interested in Aboriginal cultural product and outdoors
High potential = as per "any potential" with recent trip(s) to Canada, paid roofed lodging

Source : Demand for Aboriginal Tourism Products in the Canadian and American Markets, 2000.

Table 3. Experiences Sought by Dual Track and Other Canadians

	Dual Track	Total Potential Travellers
Natural wonders	78%	41%
Historical sites	66%	36%
Unspoiled nature	66%	33%
Adventure	57%	30%
Different cultures	53%	27%
Hobby/sport	47%	34%
City life	45%	30%
Wine/Cuisine	36%	25%
Escape winter	34%	24%

Source: Demand for Aboriginal Tourism Products in the Canadian and American Markets, 2000.

Table 4. Outdoor Activities on Trips in the Past 2 Years - Canada

	POTENTIAL DUAL TRACK TRAVELLERS 1.1 Million	ALL TRAVELLERS 19.6 Million
WILDLIFE VIEWING	**65%**	29%
HIKING/BACKPACKING	**53%**	26%
WILD FLOWERS/FLORA	**50%**	22%
FISHING - FRESH WATER	37%	24%
WHALE WATCHING	**31%**	15%
BIRD WATCHING	**28%**	13%
RECREATIONAL BIKING	**28%**	15%
KAYAKING OR CANOEING	**27%**	15%
MOTORBOATING	**27%**	18%
GOLF	26%	23%
HORSEBACK RIDING	**17%**	8%
SKIING - DOWNHILL	17%	13%
SKIING - CROSS COUNTRY	**17%**	9%
NORTHERN LIGHTS/ARCTIC	**16%**	5%
ICE FISHING	**14%**	6%
FISHING - SALT WATER	**12%**	6%
SAILING	**12%**	6%
MOUNTAIN BIKING	**12%**	6%
SNOWMOBILING	**11%**	6%
HUNTING - BIG GAME	9%	5%
WHITE WATER RAFTING	**8%**	4%
SCUBA DIVING	**8%**	4%
HUNTING - BIRDS/SMALL GAME	**8%**	4%
ROCK CLIMBING	**7%**	3%
MOTORCYCLING	**6%**	3%
SNOWBOARDING	4%	3%
WIND SURFING	3%	2%
HOT AIR BALLOONING	2%	1%
DOG SLEDDING	2%	1%

HIGH POTENTIAL = TRAVELLERS INTERESTED IN ABORIGINAL CULTURAL PRODUCT & OUTDOORS, WITH RECENT TRIP(S) IN CANADA, PAID ROOFED LODGING.

Source: Demand for Aboriginal Tourism Products in the Canadian and American Markets

Table 5. Other Key Activities on Trips in the Past 2 Years - Canadians

	POTENTIAL DUAL TRACK TRAVELLERS 1.1 Million	ALL TRAVELLERS 19.6 Million
CASINOS	28%	23%
SHOPPING - ANTIQUES	49%	28%
SHOPPING - LOCAL ARTS & CRAFTS	71%	40%

HIGH POTENTIAL = TRAVELLERS INTERESTED IN ABORIGINAL CULTURAL PRODUCT & OUTDOORS, WITH RECENT TRIP(S) IN CANADA, PAID ROOFED LODGING.
Source: Demand for Aboriginal Tourism Products in the Canadian and American Markets, 2000.

Table 6. Canadian Dual Tracker Demographic Characteristics

GENDER	HIGH POTENTIAL DUAL TRACK TRAVELLERS 1.1 Million	ALL TRAVELLERS 19.6 Million
MEN	49%	50%
WOMEN	51%	50%
AGE		
18 - 34 YEARS	29%	32%
35 - 44 YEARS	23%	24%
45 - 54 YEARS	20%	19%
55 - 64 YEARS	17%	13%
65+ YEARS	13%	13%
ANNUAL HOUSEHOLD INCOME		
UNDER $60,000	63%	66%
$60,000 - $99,999	25%	24%
$100,000+	12%	10%

HIGH POTENTIAL = TRAVELLERS INTERESTED IN ABORIGINAL CULTURAL PRODUCT & OUTDOORS, WITH RECENT TRIP(S) IN CANADA, PAID ROOFED LODGING.
Source: Demand for Aboriginal Tourism Products in the Canadian and American Markets, 2000.

Table 7. Average Nightly Leisure Trip Travel Expenditures*

Travel Segments	Canada	USA	Overseas
Any Leisure Party	$69.00	$225.00	$170.00
Leisure Parties Using Paid, Roofed Lodging	$163.00	$306.00	$235.00
Outdoor Leisure Parties Using Paid, Roofed Lodging	$157.00	$312.00	$237.00
Dual Track Leisure Parties Using Paid, Roofed Lodging	$173.00	$295.00	$218.00

Excludes commercial carrier fares. Leisure trips refer to those where the main purpose of the trip is stated as being to visit friends/ relatives or pleasure.
Source:. Demand for Aboriginal Tourism Products in the Canadian and American Markets – Executive Summary and Conclusions. (Special Tabulations CTSTATS '99).

Table 8. Outdoor Activities of Canadian Hunters and Anglers .

	Anglers/Hunters 4.4 Million	All Travellers 19.6 Million
FISHING - FRESH WATER	81%	24%
WILDLIFE VIEWING	47%	29%
HIKING/BACKPACKING	40%	26%
MOTORBOATING	40%	18%
GOLF	37%	23%
WILD FLOWERS/FLORA	29%	22%
KAYAKING OR CANOEING	29%	15%
RECREATIONAL BIKING	26%	15%
WHALE WATCHING	23%	15%
SKIING - DOWNHILL	23%	13%
ICE FISHING	22%	6%
BIRD WATCHING	20%	13%
FISHING - SALT WATER	20%	6%
HORSEBACK RIDING	16%	8%
HUNTING - BIG GAME	16%	5%
SNOWMOBILING	16%	6%
SKIING - CROSS COUNTRY	15%	9%
HUNTING - BIRDS/SMALL GAME	14%	4%
MOUNTAIN BIKING	13%	6%
NORTHERN LIGHTS/ARCTIC	12%	5%
WHITE WATER RAFTING	10%	4%
SAILING	10%	6%
SCUBA DIVING	6%	4%
ROCK CLIMBING	6%	3%
MOTORCYCLING	6%	3%
SNOWBOARDING	5%	3%
WIND SURFING	4%	2%
HOT AIR BALLOONING	2%	1%
DOG SLEDDING	2%	1%

HIGH POTENTIAL = TRAVELLERS INTERESTED IN ABORIGINAL CULTURAL PRODUCT & OUTDOORS, WITH RECENT TRIP(S) IN CANADA, PAID ROOFED LODGING.
Source: TAMS 2000 – incidence of participation (past two years)

Table 9. Canadian Angler/Hunter Accommodation-Based Activities on Trips in the Past 2 Years

	Anglers/Hunters 4.4 Million	All Travellers 19.6 Million
LAKESIDE RESORT - SUMMER	44%	24%
CAMP IN WILDERNESS SETTINGS	36%	16%
SEASIDE RESORT - SUMMER	19%	15%
SKI/MOUNTAIN RESORT - WINTER	17%	10%
DRIVE-IN WILDERNESS LODGE	17%	5%
SKI/MOUNTAIN RESORT - SUMMER	12%	6%
REMOTE FLY-IN LODGE	7%	2%
REMOTE FLY-IN OUTPOST	1%	1%

HIGH POTENTIAL = TRAVELLERS INTERESTED IN ABORIGINAL CULTURAL PRODUCT & OUTDOORS, WITH RECENT TRIP(S) IN CANADA, PAID ROOFED LODGING.

Source: Tourism Attitudes and Motivations Study, 2000.

Table 10. Image of Canada - Anglers/Hunters

	Anglers/Hunters 4.4 Million	All Travellers 19.6 Million
A GREAT PLACE FOR FISHING		
AVERAGE	8.7	8.5
% CAN'T RATE	7%	19%
A GREAT PLACE FOR HUNTING		
AVERAGE	8.4	8.2
% CAN'T RATE	26%	33%
A PLACE WITH BEAUTIFUL SCENERY		
AVERAGE	9.1	9.1
% CAN'T RATE	1%	2%

ANY POTENTIAL = TRAVELLERS WHO PARTICIPATED IN HUNTING AND/OR FISHING TRIPS IN THE PAST 2 YEARS AND TRAVELLED IN CANADA.
AVERAGE BASED ON 10 POINT BI-POLAR SCALE WHERE '1' IS DISAGREE COMPLETELY AND '10' IS AGREE COMPLETELY. AVERAGES ARE BASED ON TOTAL RATING.

Source: Tourism Attitudes and Motivations Study, 2000.

Table 11. Estimated Outdoor and Culture Market Segment Volumes (person visits)

Travel Segments	Canada	USA
Dual Trackers Pursuing Outdoor and Cultural Activities in Canada in 1999*	1.8 million	1.9 million
High Potential Markets for Specific Products (TAMS**):		
Soft Adventure (excluding hunting/ fishing)	15.2 million	23.7million
Hard Adventure (excluding hunting/fishing)	11.4 million	18.4 million
Hunting	1.1 Million	2.4 million
Fishing	5.2 million	8.1 million
Any Cultural/Learning	9.6 million	18.1 million
Any Aboriginal Cultural Activities	1.5 million	4.9 million
Cdn. Outdoors and Aboriginal Cultural Activities (Dual Track)	1.1 million	4.8 million

· overnight person visits, used paid accommodation in Canada

** Special Tabulations, TAMS

Source: Demand for Aboriginal Tourism Products in the Canadian and American Markets, ATTC, 2001.

Table 12. Demographic Characteristics of U.K. Aboriginal Culture Travellers

GENDER:	
Male	57%
Female	43%
AGE:	
18-24	13%
25-34	23%
35-44	15%
45-64	44%
65 +	5%
MARITAL STATUS:	
Married	54%
Single	27%
REGION OF ORIGIN:	
North West	7%
Scotland	12%
West Midlands	10%
East Midlands	5%
Wales	2%
Yorkshire/Humber	11%
North East	3%
Greater London	14%
South East	22%
South West	8%
East Anglia	6%
EDUCATION:	
College/University Degree	32%
MONTHLY HOUSEHOLD INCOME:	
Less than £10,000	19%
£10,001 to £15,000	9%
£15,001 to £20,000	14%
£20,001 to £25,000	16%
£25,001 to £30,000	13%
£30,001 to £40,000	13%
More than £40,000	16%
HAVE CHILDREN UNDER 18:	
Yes	19%

Source: 1996 U.K. PTMS Study (CTC).

Table 13. Demographic Characteristics of German Aboriginal Culture Travellers

GENDER:	
Male	59%
Female	41%
AGE:	
18-24	12%
25-34	21%
35-44	17%
45-64	44%
65+	6%
MARITAL STATUS:	
Married	60%
Single	24%
REGION OF ORIGIN:	
Schleswig-Holstein, Hamburg,	20%
Bremen, Lower Saxony, North-Rhine	28%
Hesse, Rhineland, Saarland	17%
Baden-Württemberg	9%
Bavaria	9%
Berlin	4%
Mecklenburg-Western	7%
Pomerania, Brandenburg,	
Saxony-Anhalt Thuringia, Saxony	5%
EDUCATION:	
College/University Degree	35%
MONTHLY HOUSEHOLD INCOME:	
DM 3,500 or less	14%
DM 3,501 to DM 4,500	20%
DM 4,501 to DM 5,500	19%
DM 5,501 to DM 6,500	14%
DM 6,501 to DM 7,500	8%
DM 7,501 to DM 9,500	14%
More than DM 9,500	12%
HAVE CHILDREN UNDER 18:	
Yes	21%

Source: 2001 Germany Consumer Research Study (CTC)

Table 14. Demographic Characteristics of Swiss Aboriginal Culture Travellers

GENDER:	
Male	49%
Female	51%
AGE:	
15-24	10%
25-34	28%
35-44	22%
45-64	33%
65+	8%
HAVE CHILDREN UNDER 20:	
Yes	32%
SIZE OF HOUSEHOLD:	
One	20%
Two	42%
Three	17%
Four or More	21%
EDUCATION:	
University Degree	18%
MONTHLY HOUSEHOLD INCOME:	
Less than 3,000 SFr.	3%
SFr. 3,000 to 6,000	37%
5Fr. 6,001 to 9,000	35%
More than 9,000 SFr.	24%
LEVEL OF EMPLOYMENT:	
Full Time	59%
Part Time	17%
Not Employed	24%

Source: 2000 Demand for Aboriginal Culture Products Study - Switzerland (CTC)

Table 15. Demographic Characteristics of Dutch Aboriginal Culture Travellers

GENDER:	
Male	54%
Female	46%
AGE:	
15-24	12%
25-34	26%
35-44	20%
45-64	31%
65 +	10%
EDUCATION:	
University Degree:	12%
REGION OF ORIGIN:	
Large Cities:	
Amsterdam, Rotterdam, Hague	16%
West	36%
North	10%
East	21%
South	17%
HOUSEHOLD INCOME:	
Less than Dfl. 50,000	14%
Dfl. 50,000 to 75,000	23%
More than Dfl. 75,000	63%
NUMBER OF PEOPLE IN HOUSEHOLD:	
One	19%
Two	45%
Three	17%
Four or more	19%

Source: 2000 Demand for Aboriginal Culture Products Study - Netherlands (CTC)

Table 16. Demographic Characteristics of French Aboriginal Culture Travellers

GENDER:	
Male	61%
Female	39%
AGE:	
18-24	11%
25-34	17%
35-44	15%
45-64	46%
65 +	12%
HAVE CHILDREN UNDER 18:	
Yes	25%
REGION OF ORIGIN:	
Paris	30%
Paris Basin	17%
North	10%
East	5%
West	19%
South-West	8%
Centre-East	4%
Mediterranean	7%
EDUCATION:	
College/University Degree	39%
MONTHLY HOUSEHOLD INCOME:	
Less than 10,000 FF	21%
10,000 FF to 12,999 FF	11%
13,000 FF to 15,999 FF	16%
16,000 FF to 19,999 FF	15%
20,000 FF to 24,999 FF	13%
25,000 FF to 29,999 FF	12%
30,000 FF or more	12%
MARITAL STATUS:	
Married	43%
Single	32%

Source: 1998 France Strategic Segmentation Study, Canadian Tourism Commission (CTC)

Table 17. Demographic Characteristics of Italian Aboriginal Culture Travellers

GENDER:	
Male	51%
Female	49%
REGION OF ORIGIN:	
North West	32%
North East	19%
Centre	30%
South & Isles	19%
EDUCATION:	
University Degree:	13%
AGE:	
18-24	18%
25-34	21%
35-44	24%
45-64	37%
65 +	n/a
PROFESSION:	
Self-employed	18%
White collar/employee	27%
Tradesman	12%
Worker/blue collar	4%
Housewife	9%
Student	14%
Retired/unemployed	17%

Source: 2000 Demand for Aboriginal Culture Products Study - Italy (CTC)

Table 18. Demographic Characteristics of Japanese Aboriginal Culture Travellers

GENDER:	
Male	55%
Female	45%
AGE:	
18-24	30%
25-34	17%
35-44	11%
45-64	42%
65+	0%
REGION OF ORIGIN:	
Tokyo	89%
Osaka	9%
Nagoya	2%
MARITAL STATUS:	
Married	57%
Single	43%
HAVE CHILDREN UNDER 18:	
Yes	22%
ANNUAL HOUSEHOLD INCOME:	
Less than Yen 3million	7%
Yen 3 to Yen 4.9 million	13%
Yen 5 to Yen 6.9 million	23%
Yen 7 to Yen 9.9 million	40%
Yen 10 to Yen 11.9 million	7%
Yen 12 million or more	10%
EDUCATION:	
College/University Degree	41%

Source: 1995 Japan PTMS (CTC)

Table 19. Demographic Characteristics of Taiwanese Aboriginal Culture Travellers

GENDER:	
Male	39%
Female	61%
MARITAL STATUS:	
Married	62%
Single	37%
HAVE CHILDREN UNDER 18:	
Yes	59%
AGE:	
18-24	15%
25-34	36%
35-44	25%
45-64	23%
65 +	1%
EDUCATION:	
College/University Degree	53%
MONTHLY HOUSEHOLD INCOME:	
NT$50,000 or less	19%
NT$50,001 to 70,000	28%
NT$70,001 to 100,000	33%
NT$100,001 or more	20%

Source: 1994 Taiwan PTMS Study (CTC)

Table 20. Demographic Characteristics of Hong Kong Aboriginal Culture Travellers

GENDER:	
Male	48%
Female	52%
AGE:	
18-24	5%
25-34	23%
35-44	17%
45-64	35%
65+	20%
REGION OF ORIGIN:	
Hong Kong Island	19%
Kowloon	31%
New Territories	50%
MARITAL STATUS:	
Married	70%
Single	22%
HAVE CHILDREN UNDER 18:	
Yes	30%
MONTHLY HOUSEHOLD INCOME:	
Less than HK$15,000	25%
HK$15,000 to HK$24,999	28%
HK$25,000 to HK$39,999	17%
HK$40,000 to HK$59,999	14%
HK$60,000 to HK$74,999	5%
H K$75,000 or more	11%
EDUCATION:	
College/University Degree	22%

Source: 2001 Hong Kong Consumer Research Study (CTC)

Table 21. Summary of Overall Estimates of European Market Potential and Volumes For Aboriginal Tourism In Canada

Travel Markets	Estimated Overall Market Volume	Interest in Aboriginal Culture Travel In Next Five Years (%)	Estimated Aboriginal Culture Travel Market Volumes To Canada
United Kingdom	4,058,000	67%	2,719,000
Germany	9,039,000	28%	2.531,000
France	1,464,000	56%	820,000
Netherlands	1,748,000	53%	926,000
Italy	4,992,000	62%	3,052,000
Switzerland	1,121,000	63%	706,000

Source: Demand for Aboriginal Culture Products in Key European Markets 2000. Ottawa: Aboriginal Tourism Team Canada, Canadian Tourism Commission.

Appendix 2

Case Studies

Case Study - Société touristique des Autochtones due Québec (STAQ)

The first Aboriginal-owned product club developed to exclusively market and support the development of the Aboriginal tourism industry began as the Société touristique Innu (STI) in 1991. After eight years of successfully supporting the growth of tourism in two Québec Innu nations in the Atikamekw and Montagnais communities, STI expanded to service the remaining nine First Nations. In this transformation, the organization changed its name to the Société touristique des Autochtones du Québec (STAQ)/Quebec Aboriginal Tourism Corporation and formed a Canadian Tourism Commission Product Club.

Today, STAQ offers tools that build the Aboriginal tourism industry to eleven First Nations and other Aboriginal groups within the fifteen Quebec tourism regions. STAQ was created with the main objective "to create, through tourism, activities that favour the social and economic development of Aboriginal communities."

Business Description and History

In the beginning, STI worked only with the two Innu nations, helping them understand and build their products for the tourism industry. STI facilitated tourism business start-up and expansion by providing information on opportunities, the industry structure, how to develop products that meet industry standards, as well as develop connections to tour operators and wholesalers.

STI realized there were innumerable opportunities for Aboriginal tourism, but in order to capitalize on these, STI had to change and it had to expand. They approached several agencies and organizations to gather ideas and support, and to outline the options. STI explored these and then developed a plan on how to expand to include the other First Nations and Aboriginal groups.

STAQ's Executive Director Guylaine Gill said, "It was important to us to change the name to Société touristique des Autochtones du Québec (STAQ) to reflect the expansion, but also to ensure the First Nations and Aboriginal businesses in these regions knew they were invited to become a part of the organization."

Presentations were made to First Nation and tourism organizations, and then with the endorsement of the Assembly of First Nations of Québec and Labrador, Tourisme Québec and the Canadian Tourism Commission, the transformation was completed.

Plans were made and objectives set for STAQ which all focused on the development of the Aboriginal tourism industry. The objectives were:

Objectives:
- improve the quality and content of Aboriginal tourism products;
- familiarize the overall Canadian industry with Quebec Aboriginals by providing access to information on the Club's activities;
- design various marketable package deals; and
- continue recruiting efforts to attract new members and partners.

The services spawned from the objectives can be categorized as:

- Marketing
    - National and international marketing of accredited products
    - Annual publication of an Aboriginal tourist guide
    - Representation and promotion of Aboriginal tourism
    - Tours Innu as a marketing vehicle
- Product Development
    - Direction and support for the development of tourist businesses
    - A multidisciplinary team capable of providing customized responses to various needs
- Human Resources Development and Training
    - Support for the training of human resources in tourism
    - Help with the accreditation process
- Research and Advocacy
    - Negotiation of goods and services beneficial to the entire membership
    - Access to pertinent and up-to-date databank
    - Information and knowledge development
    - Communications and networking
    - Quarterly news bulletins
    - Partnership development - the Product Club.

Marketing of members' products is done primarily through Tours Innu, while the full organization is promoted through STAQ with the involvement of its Product Club partners.

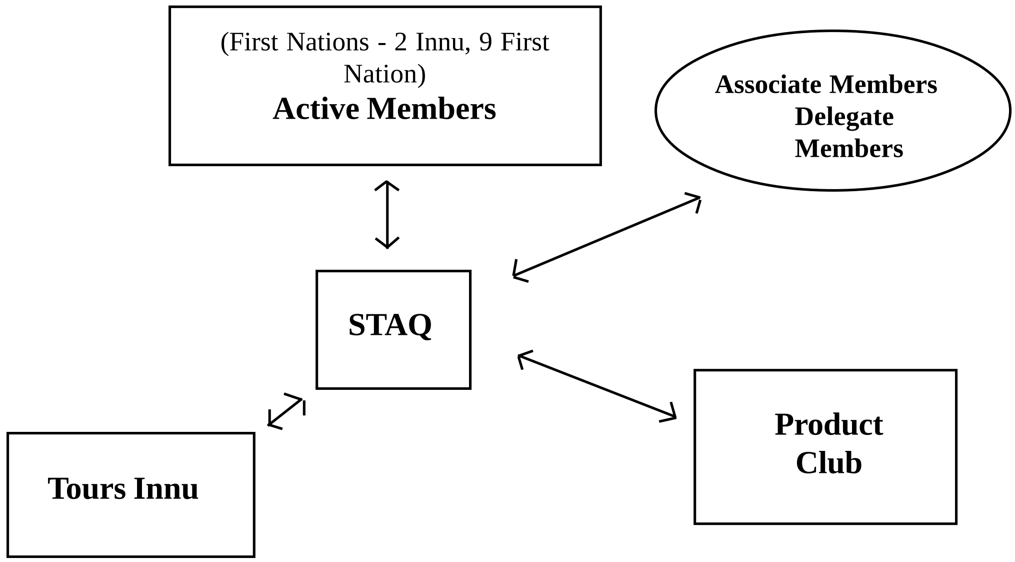
Organizational Structure

STAQ is a non-profit organization owning Tours Innu (a for-profit entity) and being the lead partner in the Aboriginal tourism Product Club.

Once STAQ received the approval to proceed with the Product Club, it inventoried more than 150 Aboriginal tourism businesses throughout the province, and developed a databank classifying them by theme.

In keeping with their commitment to develop Aboriginal tourism, a symposium focusing on preparing products for the marketplace was offered. These symposiums are important for developing the connections and linkages between the operators and the tourism associations that support and market products. Gill said, "They may know of each other in their own region, but at the symposium they have the chance to meet others, get ideas and understand how the industry is growing and the expectations and standards associated with that."

STAQ has also been instrumental in providing the research tools that support the effective growth of Aboriginal tourism products. A survey was completed with economic development agents to outline local tourism potential, and another to identify products based on partnering potential with non-Aboriginals assessed by land possibilities and visitation statistics of these businesses. Working with the Tourism Chair of UQAM, another study that defined client profiles for Aboriginal products was completed.



Membership

While STI's membership program focused on businesses operating within the two Innu First Nation territories, STAQ's membership program opened to all Québec First Nations. There are four membership categories to choose from.

1) Active Member
2) Trainee Member
3) Associate Member
4) Delegate Member.

Active membership is reserved for operators that satisfy a number of criteria. These are :

a. The business must belong entirely to an Aboriginal person or to an Aboriginal organization in which 51% of the shares must belong to Aboriginals;
b. Services and products must be addressed to tourists;
c. Tourist products or services must bear the mark of authenticity and must be focused on highlighting Aboriginal culture;
d. The business must have communications tools;
e. The business must have been in operation for six consecutive months.

Those who are just starting and want to join STAQ join as a "**trainee member**" and are offered assistance from STAQ to further establish and develop their business.

Associate members are those who "are working in a field related to the activities of Aboriginal tourist businesses" and feel "the social and economic development of Aboriginal communities" is important to them. Associate members have voting privileges and are eligible to vie for a position on the Board of Directors.
Delegate members are Band councils having an interest in tourism. They benefit from membership with STAQ through assistance with planning and implementing tourism projects. STAQ feels it is important to have Band councils involved, "since it encourages cooperation in the work to be done in conformity with community needs and expectations."
Since STAQ was established, membership has increased from roughly 60 members to 95 with approximately half being Aboriginal tourism businesses.

Planning

The plan developed to become a Product Club is the primary document guiding the operations of STAQ. The plans and activities STAQ staff use are guided by the underlying principle that "it benefits the Aboriginal tourism industry." Since STAQ's inception, it has moved ahead rapidly, successfully putting into place those ideas and expanding on initiatives spawned by STI. STAQ has completed several projects since it started.

- French and English tourist guides produced for 2000 and 2001;
- Website (www.staq.net) established;
- Tourist fairs attended - National Outdoors Show-Aboriginal Rendezvous of Montréal, Holiday and Summer Leisure Shows, Fêtes gourmandes internationales d'Ottawa-Hull and Montréal in July and August, and Great Peace of Montréal;
- Training programs delivered on topics such as client servicing, product development including programs, price setting, and distribution networks;
- Training plans for Aboriginal communities developed; and
- Aboriginal tourism businesses evaluated and accredited.

  It hasn't slowed down. Other projects are underway. STAQ is currently working on:
- Coordinating the next symposium on Aboriginal tourism focusing on preparing products for marketing;
- Developing a new, highly animated and interactive promotional concept entitled "The STAQ Aboriginal Experience";
- Publishing the next edition of the tourist guide;
- Organizing the Harricana Raid 2002 event; and
- Planning other special events.

Financing

The CTC Product Club program provides one-third finances to initiatives that promote sector development in multiple tourism regions in Canada. Other funds are provided by the Province of Québec, and Aboriginal Business Canada. Although STAQ has operating funds now, the CTC Product Club program is only a three-year commitment. STAQ realizes it needs to seek others funders, and when the CTC commitment terminates, its operations will change.

Marketing and the Tools Used

Marketing activities focus on the promotion of the organization itself to build awareness within the service region, and the second, to the tourism industry and visitors to promote Aboriginal tourism products and packages. For members and others seeking Aboriginal tourism experiences, STAQ has set up a toll-free telephone number (1-877-698-STAQ) and a website (www.staq.net) which provides information 24/7/365 on STAQ including the Accreditation program. It also connects to the websites of Tours Innu and the CTC Product Club program. All members are listed on the website with hyperlinks built to member sites.

STAQ also assists with the coordination of fam tours for agencies and the travel media helping to match them with quality products that meet their interests.
To keep in contact with their member businesses and promote accountability, news bulletins are distributed semiannually. The bulletins report on STAQ's activities, and suggest resources such as readings and websites to visit.

Tours Innu is responsible for marketing accredited products. They do this by attending trade shows distributing the tourist guide that STAQ produces and meeting directly with tour companies. The guide is also sent to key distribution points throughout the province of Québec, and other key drop-off locations.

Media and community relations' activities are important to build awareness and connections with members, as well as tourists and potential partners. Media releases are written to promote events of significance. STAQ also presents at conferences, meetings and special events to share their story.

Partners

As one of the 35 CTC Product Clubs across Canada, 'Partnerships' is a requirement of the Product Club program. STAQ has established partnerships with several organizations remaining open and encouraging to new partnerships. Partnerships are selected on the basis of their involvement with Aboriginal tourism businesses… again consistent with their principles.

Partners meet regularly to develop action plans and ensure the effective implementation of these plans. All partners are committed to the single objective, "to offer without delay a diversified and high-quality tourist product."

Product Club partners to date are: Aviation Québec Labrador, Chair in Tourism UQAM, Canadian Tourism Commission, Federation of Québec Outfitters, Mission Capital, Pash Travel, Native Benefits Plan, Canadian Executive Service Organization, Société des établissements de plein air du Québec, Native Commercial Credit Corporation, Tourisme Quebéc, Voyages Inter Nations, Aventure Écotourisme Québec.

Tours Innu - Developing Packages

As STI developed, it realized there needed to be a commercial link to the organization to promote the accredited Aboriginal tourism products. In 1997, STI founded Tours Innu "to market, through national and international tour operators and travel agencies, all Aboriginal tourist products which have been accredited by the Quebec Aboriginal Tourism Corporation".

Located in the Huron-Wendat village near the City of Québec, Tours Innu is a broker of Aboriginal tourism products operating with a Quebec permit. It is responsible for monitoring the quality of products offered in its packages, and working with STI/STAQ, it provides assistance to operators to build, regain or maintain industry standards and anticipates standard changes under the positioning statement "Authenticity, Nature, Culture."

Packages are developed based on the understanding of visitor interests, consideration of protocol of First Nations and other Aboriginal groups, and the analysis of the offerings of Innu-owned tourism products. Since the expansion of STI/STAQ, all Aboriginal tourism businesses are now evaluated for packaging potential. The following characteristics are considered in the package complements:

- Mini or long stay;
- Cultural visits or nature treks;
- Organized or tailor-made trips; and
- Individual or group tours.

These are ethno-cultural, ecological and adventure, with many offering Aboriginal cultural experiences that help the nations to preserve their culture. Packages have been developed for summer and winter travellers that feature Innu culture and outdoor adventure, interpretation and traditional hospitality. These packages have become an extraordinary tool for effectively providing information on the Aboriginal tourism products directly to visitors and in a manner respectful to the indigenous culture it is representing.

Tours Innu provides marketing services for these tours to Canadian, short and long-haul North American markets in addition to international marketplaces. These packages are sold directly to the visitor or through other tour operators.

In the early years, Tours Innu attended international tourism trade shows and marketplaces, which included BTF in Brussels, ITB in Germany, and a show in France. Gill said, "We knew these shows were important to attend to increase the awareness of our products and packages to international marketplaces."

So, after they felt they built the awareness of Tours Innu within these markets, they refined their marketing approach by reducing their presence at trade shows and concentrated their efforts on meeting directly with agencies. Gill commented, "We looked at the cost of attending trade shows and felt that we had made good contacts to begin the next phase of our marketing plan - working directly with tour packagers and wholesalers. We don't need a lot of clients to satisfy the Aboriginal businesses - our products are small and don't need a lot of customers.

The company still attends shows, but keeps mostly to consumer shows in North America such as Rendezvous Canada and Tourisme Québec where attendance costs are lower, but most importantly, stronger connections can be made with people who are right in the backyards of these tour products.

While STI changed its name to STAQ, the Tours Innu name remained the same. Gill said, "Tours Innu was already known in the tourism industry - it already had developed contacts and more tourists knew the name. It was important to keep the name to keep the market and be able to expand this success to our new packages and products."
As more tour packages develop consisting of non-Innu tourism products, change too is expected in the tour packaging operations of STAQ… perhaps a new tour company, branch or name change?

Export Readiness through Accreditation

The Accreditation System has been an important element in growing the Aboriginal tourism industry in Quebec and helping to develop a niche for Aboriginal tourism businesses. It is a system ever expanding in program content and application with the quality level bar always rising.

The program began with the preparation of a concept paper in the early years as STI. STI brought it to operators to garner their interest and support in the program, and also to test the system. Testing was essential to ensure the program could be easily applied using measurable standards acceptable to the tourism industry and applicable to the operators. Gill said, "We wanted to make sure the operators wanted the system."

STI encouraged operator involvement especially to identify norms that cover easily assessable features such as equipment, facility structural features and authenticity.
Over the years, STAQ has used accreditation to help operators develop their products. For First Nations, it has helped to ensure the continued integrity and protection, as well as promotion of the culture and its values. By following the program's requirements, operators learn what tools and systems are required to meet industry standards and with the guidance of STAQ, how to make these changes.

The first accreditation system was designed for easy application to measure and monitor the operator's customer service practices. When interest and quality products appeared to plateau, other assessment tools were added. In 2001, STAQ expanded their accreditation program to include a component on Ethics.

Ethics measures the attitudes and values of operators, and how the operator applies these characteristics in their own front-line people. STAQ assesses the quality and consistency of their hospitality through a 'Ghost Shopper' program. Ghost Shoppers are anonymous testers who assess the quality of service offered to visitors while they pose as tourists.
As time passes, industry standards have been increasing, as well as the quality level of the Aboriginal tourism product. STAQ has responded by strictly, fairly and consistently applying the standards to the Aboriginal tourism businesses. Gill says, "Some operators haven't received approval. They don't like it, but it means the Aboriginal tourism

businesses are better respected within the industry and gives credibility to our program and operators."

In the future when the Aboriginal tourism industry is ready, STAQ will develop a symbol for the program. The symbol would be used as a marketing tool for promoting businesses that have qualified under the program and, as well, be seen as a symbol of quality by the mainstream tourism industry and tourists.

Case Study – St. Eugene Mission Resort

Outside of Cranbrook, in southeastern British Columbia, approximately 60 miles from the United States border, the Ktunaxa Nation are creating a future from the past through converting an old Indian Residential School into a world-class destination resort. The St. Eugene Mission Resort consists of:

- 18-hole championship golf course;
- Delta Cranbrook Hotel - 125 rooms and restaurants;
- 4,000 square foot meeting facilities including 8 meeting rooms with a capacity of over 500
- Health club facilities - aquatic, fitness and recreation centre; and
- Aboriginal amenities and features - Ktunaxa Interpretive Centre, 24-unit rustic teepee camp, Ktunaxa Arts and Crafts Store.

Although situated adjacent to the resort, the Casino of the Rockies is an independent business unit managed by Lake City Casinos for the BC Lottery Corporation.
Since the beginning of the 1900s, the St. Eugene Mission has shaped the history of the Ktunaxa people, first as an Indian Residential School until it closed, and now as the nucleus of the economy for the five Ktunaxa Indian Bands. As one of the oldest building in the East Kootenays, the Ktunaxa recognized the site had a tremendous amount of historical value offering the opportunity to the Ktunaxa to tell the history of the area from the original inhabitants' perspective.

Situated 4 kilometres outside of Cranbrook, the Ktunaxa/Kinbasket Tribal Council (KKTC) opened the St. Eugene Mission Resort in September 2002 providing 200 direct jobs to the Nation's 1,600 citizens and an area population of around 25,000.

The Ktunaxa – Today and History

The Ktunaxa Nation consists of seven Bands of which five are located in Canada and two in the United States. The Canadian Bands have roughly 1,200 registered citizens with the Band reserves being all within the Kootenays of British Columbia. The Bands are the St. Mary's near Cranbrook, Columbia Lake near Windermere, Lower Kootenay near Creston, Shuswap near Invermere, and the Tobacco Plains Band near Grasmere.

The nation being divided by the 49th parallel, the five Canadian Bands formed the Ktunaxa/Kinbasket Tribal Council to cooperatively address issues of common interest such as health, education, housing, land and resources, community economic development, employment and training, language and culture.

After the residential school closed in 1970, the main site consisting of 305 acres and the old school building was returned to the federal government who assigned it to be held in trust for the five Canadian Bands. Immediately after the closure of the school, the federal and provincial governments began negotiations to lease the building to the province for use as an institute for mentally challenged people. During negotiations the province began renovations of the building, removing fixtures, flooring and walls. Meanwhile, changes in provincial policies to institutionalize the mentally challenged caused negotiations to terminate. Although the province was in the middle of renovations, it withdrew its crews leaving the building in disrepair. With doors, floors and wallboards missing, the Ktunaxa were without the financial resources to return the building to any usable state.

Over the next twenty years the Nation would entertain several concepts for the site with the idea of a resort arising frequently. A resort was attractive to the Ktunaxa, for several reasons - employment, economic opportunities, as well as for cultural preservation and enhancement. However, a comment made by one of the Elders during a discussion about the building was the most influential to choosing this concept. Elder Mary Paul in 1984 said, "It was in that building our culture was taken away, and it is within it that it should be returned."

Phasing the Resort's Development

The resort concept consists of an 18-hole professional golf course, 125-room hotel with a 500-person conference centre, Ktunaxa Interpretive Centre, 24-unit rustic teepee camp, restaurants and gift store. As the concept developed, the opportunity for the Nation to apply to manage a destination casino also arose. The Nation found partners and experienced consultants and were successful in their bid, adding another element to the development of their site.

Phasing the development has been a decision influenced both by business decisions and circumstance. The golf course was the first phase to open, with three seasons' operation prior to the hotel opening.

"Originally we had planned to open the conference centre and teepee camp accommodations at the same time as the main hotel, but other circumstances had us rethink that," said Chief Sophie Pierre, KKTC Administrator and Chief of the St. Mary's Band. Challenges in securing financing, industry influences such as the terrorist attack on September 11, 2001, and increased construction costs resulted in modifications to the phased development, downsizing and postponing some component construction. Part of this involved the downsizing of the conference facilities, which will open with meeting rooms in the main facility and then expand to full facilities in 2003 along with the health centre. The Ktunaxa Interpretive Centre is scheduled to open in spring 2003, with the teepee camp in the summer 2003.

Developing Plans and Finding Partners

Knowing the KKTC or its Bands did not have the financial resources, knowledge of building a major resort, nor the ability to manage it, the Ktunaxa used their resources to leverage financial support from Aboriginal Business Canada, and the provincial and federal governments for testing the feasibility of the concept. "We knew we had to have credible, knowledgeable consultants and advisors involved with the development to attract the financiers and investors we needed to put the resort together. We also knew we were not hotel managers," said Pierre.

Market and financial feasibility studies were completed first. The studies helped to identify the challenges and opportunities, market interests and financial requirements thus shaping the overall concept identifying components such as amenities and features to create the resort. Pierre said, "Once we knew the concept had the ability to succeed, we began developing the financing package, site plans for aesthetics as well as highest and best use, and assessing the site for environmental matters."

The original concept estimated the cost of the resort to be $21 million, but over time the resort expanded to $40 million with part of this increase attributed to planning. Some of these costs were revisions to financial and marketing feasibility studies that had to be redone when they became outdated or at the request of funding agents who wanted further information.

Studies also had to be updated when land designation approval by the federal government kept missing financing and partner deadlines. Pierre said, “We also found that government approval processes were incompatible with the tourism industry.” This resulted in the KKTC enduring tens of thousands of extra costs, and the loss of its first hotel management partner.

Costs for legal fees exceeded budgets. The increased cost was attributed to additional advisory services and preparation of legal instruments for land designation of the reserve land, as well as agreements that would produce the security required for debt financiers and other investors. Pierre said, “We approached these costs with the belief that we were developing templates for agreements that other First Nations could use for their own on-reserve developments, but then learned that the Indian Act and Department of Justice require new agreements for each time a First Nation develops a major venture on reserve.”

The KKTC invested over $6 million to the venture, with Aboriginal Business Canada contributing $1.5 million and Human Resources Development Canada providing $1.1 million. Other financial support was provided by Western Economic Diversification Canada, the Royal Bank of Canada, Columbia Basin Trust, and Delta Hotels Canada. Partnerships have been an important element to the development of the resort. The KKTC has partners in the golf course and hotel, retaining sole ownership of elements that have a significant Aboriginal cultural component.

The Columbia Basin Trust Fund became an investor in the golf course and later a manager after they were approached for a loan to the golf course development.

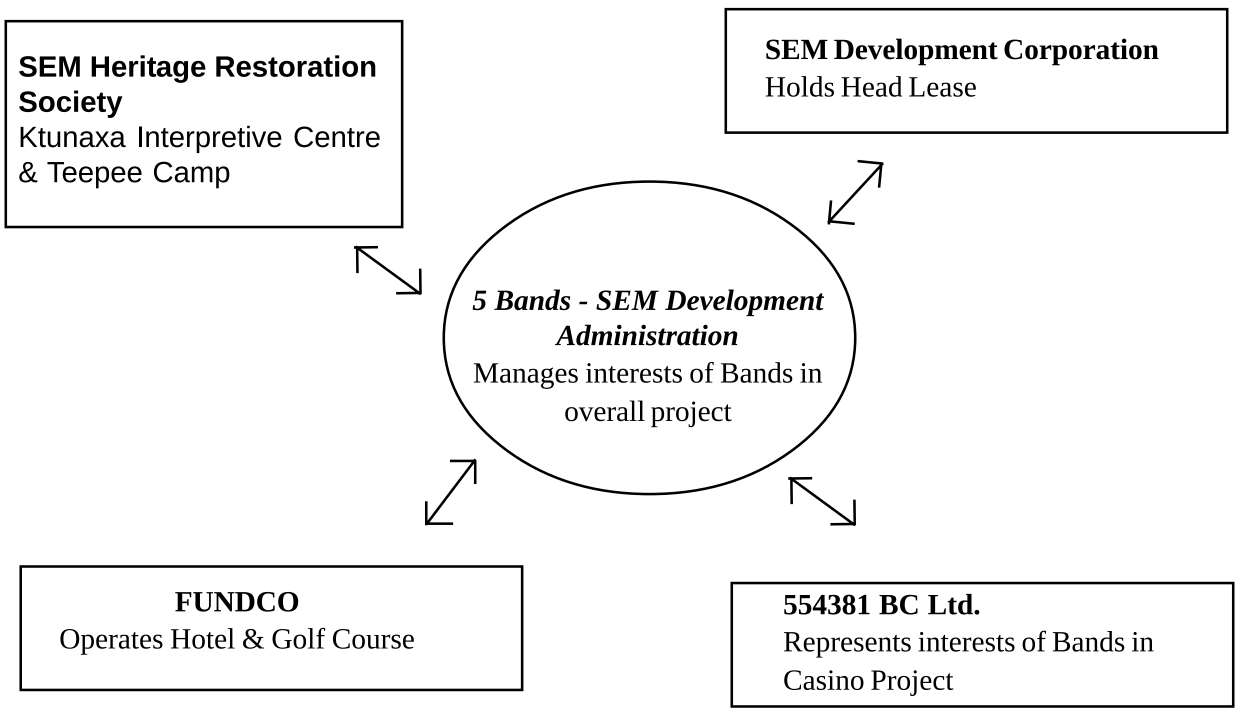
“One of our strengths in this development is our ability to recognize our weaknesses. We knew we weren’t resort or even hotel managers, so we looked for partners who were.” Early in the development the KKTC hunted for a hotel partner, seeking one that had a good reputation, an excellent reservation system and one with properties that the St. Eugene Mission Resort would complement. One of these hotels was Delta Hotels. Although interested, Delta was unable at that time to join the development due to other investments and development plans. The KKTC then entered into partnership with another hotel chain, however barriers unique to Indian reserves and delays in federal approval contributed to the breakdown of the partnership. This opened the door for Delta Hotels and the KKTC to establish the partnership.

Structuring and Protecting Interests

Since the land the resort is situated on is an Indian reserve, the ability of the KKTC to provide security to its investors and lenders became an issue. The St. Eugene Mission Resort Development Corporation was formed having a Director from each of the five Bands. The Corporation was the instrument to hold the head lease, which became the security to investors and lender. The corporation was also an important element to ensuring the cultural interest and needs of the citizens were protected.

The five Ktunaxa Bands are the centre of the ownership structure, each holding an equal share (20 percent interest), voice, rights and obligations with profits (once they are produced) being distributed equally. A Board of Directors to which each Band designates their representative to the SEM Development Board supervises the Bands' interests.

Figure 1: St. Eugene Resort Structure



Bands are also the sole beneficiary of the corporations, which are set up as commercial trusts of which Chief Sophie Pierre has been designated as the sole trustee. Each corporation has a trust agreement with Pierre.

Generating Support

Ensuring our Bands and the local non-Aboriginal communities were aware of the development was important to garnering their support and demonstrating to the provincial and federal government the resort would contribute positively to the regional and provincial economies. Presentations were delivered to regional municipalities and districts, as well as member-based organizations such as the Cranbrook and Kimberley Chamber of Commerce, local tourist associations, and the Rotary Club. Pierre said, "We told them what we were planning and showed them how the resort would benefit everyone in the area, including other businesses, golf courses and resorts, and asked for letters of support. These letters were added to the appendices of our plans."

The KKTC also set up an exhibit at the annual Kinsman Trade Show to distribute information and answer questions from the general public. They also scheduled interviews with local and regional print media and radio. Information sessions were held for the five Bands to also provide information, gather ideas and concerns, and to promote business, employment and training opportunities.

The St. Eugene Mission Development Corporation assured the KKTC Band citizens of long-term ownership and protection of their interests. Several subcommittees were also structured inviting Band members to their boards for comments and direction in training and cultural matters.

Creating Employment and Business Opportunities

The plans identified that the resort would create roughly 100 jobs in construction and a further 100 jobs in the resort operations. The KKTC wanted to ensure as many of its members and Aboriginal people could qualify for these opportunities. Pierre said, “Our Bands looked at these jobs, and agreed to not establish targets for employment reinforced by policies. We wanted to make certain that both our people and the resort had the best chance of success.”

A Human Resources Development organizational chart and strategy were designed connecting the arms of the KKTC involved in human resources development, training and employment to the resort planning team. They evaluated the employment opportunities against the skills and interests of the people within the Bands to determine training and educational requirements. The creation of a program they called “Individual Training Plans” or “ITPs” helped to identify people interested in hospitality and tourism, and construction as well as to design programs that met these people’s needs.

They then looked for partners to develop the training programs. These partners included the local College of the Rockies, area training centres and Human Resources Development Canada. Together they developed diploma and certificate courses offering them to the Aboriginal and non-Aboriginal population. Delta Hotels also offered its training programs hosting information sessions for interested people.

Recognizing the resort created not only employment opportunities, but also business opportunities, the KKTC Economic Development Department prepared a list of business ideas, while the Ktunaxa Independent School System fostered the establishment of the Helping Hands Women’s Cooperative. The Cooperative provided training to Aboriginal women who were chronically unemployed developing skills in arts and crafts manufacturing and knowledge in business management.

The Cooperative will operate an on-site arts and crafts centre at the resort demonstrating the production of traditional crafts, offering craft making sessions to guests, and selling handcrafted gift items. The Cooperative also plans to distribute their products to other marketplaces.

Others too have started businesses that link to the resort. The St. Mary’s Indian Band established the **?aq’am Native Plant Nursery** which is propagating and preserving culturally significant plant species and will provide these plants to operating areas of the resort. A citizen of the Band, **Isaac Birdstone,** has started a business offering cultural and historical interpretation of the Ktunaxa and the school.

While the resort developed, the interest within the membership also grew. Community members started inquiring, “When will the next project start? Can my son/daughter get a job?” Youth started talking about the resort too. Pierre said, “While I was driving my son and his friends, who were ten to twelve years old at the time, past the old school before it was open, they said, ‘We’re going to work there when it opens.’ I said, ‘What will you do?’ They said, ‘We’re going to be golf caddies.’”

When the golf course opened in 2000, these youth found jobs in golf course maintenance and the pro shop. Pierre added, “This resort has given our youth something to plan for. It has given them a future.”

The golf course employs 45 seasonal and permanent employees of Aboriginal and non-Aboriginal origin. “Some of the people who are employed at the resort are people who have been in the tourism industry and regional economy for decades,” said Pierre, “and now they’ve brought their expertise to our development.”

On golf course maintenance, the KKTC has successfully achieved 80 percent Aboriginal employment in its first two years of operation. In this time period, the golf course also exceeded the financial projections achieving the highest number of rounds of golf of the courses in the East Kootenays. And in 2001, the course won third from Golf Digest for “Best New Golf Course” in Canada.

Markets and Reaching Them

Over the 12 years of planning the resort several market feasibility studies were conducted, some were to update prior information verifying that the market opportunities still existed, while other times it was to qualify the continued viability of the development. The market studies influenced modifications to the concept such as the number and types of rooms, meeting facility size, amenities offered and pricing. In each market feasibility study the following key markets were defined:

- Alberta;
- Closest neighbouring American States - Montana, Idaho, Washington;
- British Columbia; and
- International - Germany, United Kingdom.

The largest market for the golf course outside of local residents originates within a 4-hour drive radius of the resort with Calgary being the largest city centre. While the hotel and casino anticipate the same geographic markets, they plan to cast their marketing efforts wider, targeting long-haul Canadian and American markets, as well as international visitors.

Summer marketing will target the golf market while in the winter the resort will emphasize corporate meetings and casino products focusing on bus tours. Delta hotels sales staff initiated marketing efforts prior to the hotel opening by meeting with regional corporations and reconnecting with the travel trade. Highway signs and brochures also promoted the resort before it opened.

“We didn’t accept the adage ‘If you build it, they will come’. Instead we started building the awareness of the resort years before it opened,” Pierre said. With the hotel partners, pre-event marketing began with brochures and web pages, as well as the distribution of media releases. Many federal and provincial officials made announcements on their contributions to the development, which aided in producing awareness in markets across Canada, North America and other places like Japan and the UK. The resort has also been featured in many newspapers and magazines - business and industry. Several presentations to different First Nations and tourism industry events were also attributed to

building awareness.
An important element to reaching North American and international marketplaces has been partnering. “We sought a partner who was well established in the hospitality industry, with a quality reputation, and good international reservations system - we found this in Delta Hotels,” said Pierre.

Resort components have their own websites that are linked to one another. The golf course uses brochures and places advertisements in key industry publications to build awareness, and offers group and tournament rates. The golf course also participates in trade shows and marketplaces either as a sole exhibitor or in partnership with regional courses.

An annual National Aboriginal Day golf tournament held on the Thursday closest to June 21 raises funds for the KKTC to support youth, Elder and cultural initiatives. Pierre adds, “This is also an important event to bringing together key leaders in the Aboriginal environment and our supporters building awareness in the resort.”

Studies specific to Aboriginal tourism revealed a tremendous interest by the German market in North American Indians. Searching for opportunities to promote the resort to this group, the KKTC was offered the opportunity by Tourism British Columbia to create a First Nations Program as part of the DERTOUR Reisakademie 2002 which was hosted by Tourism Vancouver with the support of Tourism British Columbia. DERTOUR brought 700 high-performing German travel agents to Vancouver to learn of the visitor experiences in Vancouver and throughout British Columbia. Pierre said, “We saw this as a chance to extend our hospitality to this group and contribute to the growth of First Nations tourism in BC by ensuring a culturally appropriate program that respected protocol and provided a sampling of the diversity of the First Nations in BC.” The program hosted two dinners for each group of agents and tourism industry VIPs, gifting, opening ceremonies with the Tsleil-Waututh, Squamish and Musqueam First Nations offering a traditional grand entry and signing of a protocol welcome.

Perseverance Creates Opportunity and Benefit

After twelve years of planning, the resort will provide direct employment of up to 240 people full-time during peak season, and a further 240 indirect jobs in the region.
The economic benefits to the province and the regional economy are great, anticipating over $10 million in gross sales alone in the resort’s first full year of operations. Add another $2.6 million to the incremental tourism receipts spent by visitors to the resort.

Both the federal and provincial governments will benefit greatly. Project Manager Helder Ponte projected, “The governments should receive a full return on their investment through taxes, provincial government share of casino revenues, and savings in social programming in roughly four years of the resort opening.”

Despite being on-reserve, the provincial government stands to gain the most of this resort development achieving a 22.8 percent profitability index with payback of its $3 million investment in 1.5 years.

Benefits to the local economy from labour payments and consumption of local goods and services were estimated at $5.88 million in the first year to over $11 million after 15 years of operation.

The benefits the resort will provide are more than economic, they also exist in social and cultural facets. Dependence on outside forces such as government assistance programs (social and employment) is being reduced. The cycle of chronic unemployment is being addressed increasing self-esteem, self-reliance, pride and motivation amongst the nation. Pierre said, “We see the resort has already provided a brighter future and new career opportunities for our youth. Our people now have access to employment within their own community. We’re creating a future for ourselves from our past.”

The advice of Elder Mary Paul, “…it should be within that building it (our culture) should be returned…” is being followed. The KKTC also see the resort as a means to cultural revival through preservation and promotion of the most valued aspects of the culture and the Ktunaxa history. Pierre remarked, “The St. Eugene Mission Resort is providing a place where our people can share our history, culture and language with others.” This means that visitors will gain greater knowledge and awareness of the Ktunaxa with opportunities to learn the culture and language. “Visitors will have a more rounded and factual perspective of British Columbia and Canada’s history.”

Case Study – Huit Huit Tours

Set up as a Hudson Bay Company trading post in 1913, Cape Dorset, Nunavut, is again a place of discovery, but this time for tourists. Located 395 kilometres west of Iqaluit, there are no banks in Cape Dorset for the 1,118 residents of which 90% are Inuit. The Inuit culture and language are very much alive. Visitors cannot go to Cape Dorset without having a cultural experience. Many of the Inuit people still live traditionally and speak Inuktitut. The mature Inuit are the most knowledgeable, being experts on hunting, weather, directions, astronomy, plants, beliefs, ethics and other Inuit culture. They were born on the land and lived the 'real' nomadic Inuit way of life. Tourism is very much in its infancy offering the Inuit people the opportunity to mould it into an industry that reflects their cultural values and needs.

Timmun and Kristiina Alariaq have been a part of the industry since 1990 when they started their first bed and breakfast and then later expanded to tours (community, land and sea). Timmun, an Inuit man, was born in an outpost camp and raised on the land, while Kristiina had lived in Cape Dorset for 25 years learning to live on the land from the Inuit people. They had good knowledge of the region, area and culture, and felt visitors should too learn about the culture - they should have an educational experience.

When cruise ships began arriving in Cape Dorset a few years ago they saw there was no consultation with the community. Passengers would get off the ship, go to the print shop, buy carvings and get back on the ship without leaving a real benefit in the community. Timmun and Kristiina recognized that the community needed to get involved, and that the community should also benefit from this exchange.

At first Timmun and Kristiina were reluctant, saying, "It's a large group, 100 to 150 people, in such a short period of time. It's like a big woosh when they come and leave." Other people in the community too were concerned. Some of the kids would say rude things to visitors, discouraging them from returning or promoting the area to others. "We knew that if we got other people involved, then more people would see cruise ships as a positive thing, not negative, and the community would benefit." The goal was to create an educational experience to help visitors learn about the Inuit culture and people, and so community tours began.

Cape Dorset

Key features of Cape Dorset and Dorset Island are the pristine arctic landscape with its abundance of wildlife attracting visitors from around the world - the German travellers being the most prevalent. Cape Dorset has also built the reputation of being the "Inuit Art Capital of the World." The Inuit culture, language and lifestyle are still very much alive with many Inuit still speaking Inuktitut as their first or only language, and practicing hunting, fishing and trapping for sustenance purposes.

The peak tourist season in Cape Dorset is only two months being July and August requiring tourism business owners in the area to work outside of the businesses. Timmun and Kristiina are no exception. Both work full-time elsewhere, while maintaining the bed and breakfast business year-round and offering winter tours.

Building and Planning Huit Huit Tours

Huit Huit Tours was borne from the bed and breakfast business that utilized a second home Timmun and Kristiina Alariaq owned. It was a dream they had to "offer a good service for visitors ensuring they had a comfortable place to stay, and a way of connecting with people in the community to learn about the culture." The inquiries they received from their guests and the Cape Dorset cruise ship passengers presented them with the opportunity to expand their business to include tours.

Kristiina said, "We started to get requests right from the beginning for tours – we delivered 2 to 3 group tours a summer. We put together customized packages for them." At first all the tours were customized, but the time it took to plan them was too intensive leaving the Alariaqs feeling unrewarded. Kristiina explained, "We couldn't charge people for the time it took to plan these experiences. If we did, the tours would be too expensive and people wouldn't buy them." So, Kristiina and Timmun looked for ways to improve this. In 1998, the Alariaqs wanted to see if the tours would be more viable as a full-time business. They decided to develop the tour side of the business, building packages and marketing them.

A business plan was started and applications made to funding programs to support the expansion and marketing costs. With these funds, they purchased another house, bought a bigger boat in 1990 to take more people out, added more guiding equipment, developed their website in 1999, and went to two trade shows in Toronto in 1999 with the help of Nunavut Tourism. They also produced 3,000 brochures in 1999 containing similar information to what is in the website. This expansion has resulted in Huit Huit doubling their gross sales.

The brochure is distributed on site, at trade shows, in Iqaluit, as well as sent to Nunavut Tourism and mailed directly to people once they've booked a trip. Plans are to update the brochure when the copies are out.

Building and maintaining relationships has been an important element to the continued operations of Huit Huit. Nunavut Tourism has been a good partner in promoting the tours and supporting their marketing activities. Huit Huit also works with other groups to develop packages in Cape Dorset as well as other parts of Nunavut. Presently, a tour is being developed in partnership with a company that owns an 18-seat plane. The partners have set the objectives to develop two cultural-based group land summer packages of 4 and 7-9 day durations.

Tours, Packaging and Policies

In keeping with the Alariaqs' goals to provide educational experiences, all packages offer a cultural component. Community tours incorporate more cultural entertainment experiences. Groups of 6 to 8 people are exposed to cultural activities, and meet with Elders and artists. The community art tour is the most popular package offered stopping at the West Baffin Eskimo Co-operative where stone cut prints are made. The evenings are culture based, featuring storytelling by Elders, throat singers and tea with artists. Although the art tour is popular (especially with cruise ship passengers), it is the land and sea tours that they enjoy hosting the most. The land and sea adventures provide Timmun and Kristiina with the opportunity to reconnect with the land and to share the rich culture and history of the Inuit people. These tours introduce visitors to traditional seasonal activities of local Inuit, such as seal hunting or ice fishing. Depending on seasonal conditions, camping is provided in igloos or tent with trips to the floe edge, archaeological sites and the hosts' cabin.

Land and sea winter and spring packages are restricted to a maximum group size of 4 while the summer trips permit up to 8 people. Trips are all inclusive from Cape Dorset including guides, accommodations, 'Northern food' meals and transportation. Huit Huit also supplies tents, 3-season fibrefill sleeping bags, air mattresses, all camping equipment, including arctic survival suits for boat trips.

When Huit Huit is providing community tours to cruise ships passengers, they divide the 100 to 150 passengers into small groups offering them 6 to 8 activities to choose from. Community tours are kept small enabling guides to be more responsive to visitor inquiries and for the small facilities to accommodate visitors comfortably while minimizing visitor impact and maximizing economic benefits.

"When we know there are community cruise ships tours coming," said Kristiina, "our group gets together to design what we're going to do, and who's doing what." By involving the full staff in the planning, stronger ideas are developed and visitors are better enriched by the experience." Guides are local Inuit people having extensive cultural knowledge and experience acting as resource people. Many are family members having worked with Huit Huit for several years.

Getting involved in tourism has also meant that the Inuit people are directly connected with shaping the tourism industry ensuring that there are benefits provided to the original people of the land and that the Inuit culture is delivered in a respectable, appropriate and authentic manner. On-the-land tours introduce visitors to traditional seasonal activities of local Inuit, such as seal hunting or ice fishing.

Huit Huit customers are required to arrange their own transportation to Cape Dorset arriving either by cruise ship or air. Realizing that airfare costs are significant, Huit Huit negotiated a special tour fare with First Air for flights between Ottawa and Cape Dorset for around $1,300. First Air offers daily flights on this route, is Aboriginal owned, an Air Canada partner, and one of two airlines flying into Cape Dorset.

Keeping with good management practices, Huit Huit developed operating and cancellation policies to reflect the Cape Dorset climate. Since weather conditions in Cape Dorset and the areas the tours visit are unpredictable - high winds, packed ice, fog, cancelled flights, etc. - Huit Huit retains the right to modify itineraries, and adjust prices if weather conditions warrant. Kristiina said, "Many of our suppliers require us to commit well in advance of the trip, and being in the area we are, our food supplies also have to be ordered well in advance. We had to develop our cancellation, payment and refund policies to reflect this. We can't control the weather, and when it dictates, we have to change our itineraries too." A $200 administration fee is applied to all cancellations while an additional 25% is kept 90 to 61 days from the trip date. For 60 to 31 days they retain 50%, 30 to 15 days it is 75%, and 14 days or less it is the full 100%.

Both Timmun and Kristiina are actively involved with managing and delivering the tours taking care of administration, tour coordination, marketing, bookkeeping, equipment and building maintenance, including guest pickup. Realism can be a factor attributed to their success. Although the business has been operating since 1990 and year-round, both Timmun and Kristiina work outside the business to meet the family needs. “We never expected the business to be our sole supporter,” Kristiina said. “For us, we saw the business developing naturally and slowly, as it should.”

Creating Community Benefits

Developing tours has also provided the means for the Alariaqs to create new job opportunities as guides for the community and land and sea tours enable other Inuit people to share their culture and benefit from the industry. Mostly family based, the business employs one house cleaner year-round casual expanding to full-time hours in the summer, and adds two full-time guide assistants for summer tours. In earlier years, summer employees were part-time casual, but as the business expanded so has the employment opportunities and duration.

In keeping with traditional practices, they try to have a younger person with them on the tours to transfer knowledge and for carrying the heavy stuff. Kristiina said, “The younger person learns the traditional way of doing things, and we gain from their strength.”

Preparing Guests for the Experience

Huit Huit helps their guests prepare for the trip utilizing their website as a communications tool. The website lists the packages describing what is and is not included, company and guide background and history, and the booking terms and conditions including payment and cancellation policies. Guests also learn what to bring and expect in cultural and nature-based experiences, and other activities available in the region through hyperlinks to other websites and recommended guidebooks.

Once the trip application and 25% deposit is received, Kristiina sends a ‘Joining Package’ that details information about the trip, as well as contains a medical form, travel information form, release form and a detailed clothing list. Trip cancellation policies and refunds are also included.

Welcoming Visitors and Getting Involved

Kristiina is also a member of the Cape Dorset community planning committee. The committee is responsible for planning community infrastructure, ensuring negative impacts from tourism are addressed and getting people involved.

Management, Planning and Sustainability

Kristiina said, “We learned the best way to operate in this business is to be open to things happening - you can’t force things. There is a natural time for things to occur.” Plans and operating guidelines are still used to guide the business with financial and operating plans and ensure cultural values are respected and the natural environment sustained.

When Huit Huit decided to expand into tours, Kristiina started a business plan covering business expansion, markets and marketing activities. As financial resources became available, the Alariaqs purchased additional homes expanding to four bed and breakfast homes. In 2002, Huit Huit will begin accepting bank debit cards for payment in addition to the already accepted credit cards and purchase orders.

As an operating practice, Huit Huit allocates 50% of revenues for expenses with part of the remaining proceeds being turned back into the business for asset improvement.

Huit Huit assures cultural and environmental sustainability by involving Inuit people in planning and delivery of cultural initiatives and incorporating cultural values into operating principles. These principles include practices of not leaving garbage around, of burning or bringing back what they've taken out to the land and sea, not modifying the natural environment or historic sites, and guiding by traditional values and principles.

Future plans include Kristiina learning how to build and maintain websites so she can update the site herself, adding more winter tours utilizing the dog team they have, and developing other packages that will attract past customers.

Knowing the Market and Marketing to Them

Huit Huit Tours operates primarily in the summer/peak tourism season attracting international visitors from Germany and the United States, as well as Switzerland. Canadians and Americans account for 20 to 30% of customers, while overseas visitors represent 70 to 80%. In the winter the bed and breakfast business provides needed accommodation to the Cape Dorset business traveller. At present, accommodation rentals account for 70% of sales with tours being 30%.

Bookings begin in January and February starting with email inquiries leading to bookings in March and April over an intensive 20-30 hours and then finally some trickling off in June. Half of the bookings are done directly with Huit Huit, while the balance are sold on net rate or commissions to tour operators that Huit Huit has known for some time. The rate they pay to these operators is based on the group size and sale value.

"Marketing is our biggest challenge," Kristiina said. When Nunavut was created in 1999, Huit Huit had lots of customers, but since then the number of area visitors has reduced. Most guests are first-time customers with few repeat visitors. The lack of repeat customers is attributed to the high cost of travel to Cape Dorset and the cost of the tour package. Huit Huit spends 5-10% of their revenue each year on marketing and depends on referral, the relationships they've built with tour operators and industry organizations (i.e. Nunavut Tourism) to complement their marketing activities. The company brochure and website also help to attract customers.

They have also been involved in fam tour, but were disappointed when a group of travel writers they hosted in a fam tour didn't print stories on their venture. Since then, Huit Huit has selected fam tours and promotional opportunities from recommendations from organizations such as Nunavut Tourism. It also advertises in travel guides such as Arctic Traveller and other websites.

Case Study – Temagami Anishnabai Tipi Camp

“Tourism has helped to put Bear Island on the map,” said Virginia McKenzie, sole owner of Temagami (Te-MAWG-a-mee) Anishnabai Tipi Camp and a member of the Temagami Anishnabai First Nation with years of experience and knowledge of her traditional lands. She started the business in 1997, inspired by her desire to help educate others on her culture by teaching the values of respect for land, inviting them to experience the way of life, and demystify the perspectives of the Ojibway.

Temagami

Located over 5 hours northeast of Toronto, the Temagami area has a year-round population of 970, which expands by six times in the summertime. Attracted to the abundance of clear freshwater lakes, the area boasts artefacts and stone carvings that date back to 6,000 BC, providing a solid base for cross-cultural experiences at Temagami Anishnabai Tipi Camp (TATC). Temagami is also known as the marriage site of the legendary Grey Owl (Archie Belaney), an English nature writer who in 1906 came to the area and fell in love with the Anishnabai people and way of life. Bear Island was as well a Hudson Bay Company trading post.

TATC is situated on the Bear Island Indian reserve of the Temagami First Nation, which in the Ojibway nation is affectionately referred to as the “Deep Water People.” The Band has an on-reserve population of around 600 people, and is accessible by road from the municipality of Temagami.

The tourist season is from mid June to the end of September.

Planning Temagami Anishnabai Tipi Camp

Virginia worked for the Temagami First Nation in the area of community economic development and assisting people with developing business plans. She discovered she enjoyed sharing her culture with others, helping to illuminate ideas and perspectives of the Anishnabai of the Ojibway. With funding support from Aboriginal Business Canada, Virginia hired a consultant she learned had a good relationship and credibility with funding programs, and was well experienced in tourism. The consultant provided her with good advice on developing her business concept and how to navigate through financing and managing a new business.

In developing the business plans, Virginia commented, “We looked at what I could afford, what principles I wanted to maintain, exploring all aspects. I wanted to keep it simple, clear and clean and not ‘sell the family farm’.” It was important to Virginia to be mindful of the Anishnabai ways, focusing on vision and the reasons she wanted to start this business. The business plan outlined operations and the marketing strategy, equipment, staffing and financing requirements. Implementing the plan has been done in stages resembling a map. Five years later, other components of the plan are being applied.

The plans had to address how TATC would respond to the ‘seasonality’ of the tourism industry addressing operations, financing and dealing with funding programs. While the consultant prepared the business plan, Virginia attended workshops offered through the

Gezhtoojig Employment and Training. In these sessions, she learned about and prepared a three-month work plan outlining camp operations covering food preparation requirements, health, camps, and basic camp set-up. She also gained training on computers.

When planning for TATC began, Virginia wanted to ensure she created and developed a camp that was respectful of the Temagami culture and community. Community members, Chief and Council were invited to provide comments into the camp concept outlining what activities were acceptable to share with guests, and where camps and hikes could be conducted. The community was asked for their support to start the business and this came in the form of a Band Council Resolution (BCR). A land survey was also conducted to define sites for use and protected areas.

Camp Packages

Temagami Anishnabai Tipi Camp (TATC) offers five-day and weekend camping experiences delivering Ojibway medicinal and healing plants use lectures, sharing circle discussions, story and legend telling by tribal Elders, swimming, fishing, canoeing, feasting and hiking in old growth forests. Very much a family business, Virginia and her father are the heart of the business while sisters, sons and cousins are hired as needed.

Camp packages offer a wide array of soft outdoor activities and interpretive experiences, yet remain flexible to respond to the needs and wishes of each group. Virginia explains, “When the people arrive, they find there is so much to do here. We find out what other things they’d like to do and make the arrangements. Some people just want to relax, while others like to do many things.” Packages offered are:

1. **Five-day packages -** are offered Monday to Friday providing a whole array of soft adventure, outdoor experiences on the water and land, coupled with Anishnabai interpretation around a campfire and on the trail.
2. **Weekend Program -** arriving Friday afternoon and departing on Sunday, this package begins with an orientation session before a full slate of activities combining swimming, canoeing, story telling, stargazing, fire pit chat, relaxation with Anishnabai interpretive hikes and home cooked meals.
3. **Women’s Retreat -** designed specially for women who want to get into the outdoors and meet other adventurous women, the adventure includes hiking, sightseeing, boating, swimming and campfire teachings. Registration is limited to 7 participants.
4. **Artist Retreat -** local artist Hugh McKenzie shares his unique art form of stencil and sponge painting with guests. Camping and hiking activities complete this experience. Registration is limited to 8 participants.

Groups are kept to a maximum of 17-20 people while the preferred group size is eight. Smaller group sizes enables Virginia to keep the impact on the land to a minimum, build amicable relationships with her guests, and ensure that the community’s privacy is respected. Small groups are also more likely to be invited to observe or participate in Temagami community’s events and celebrations.

Once the deposit is received, guests are sent an orientation package that lists recommended packing gear and supplies, what to expect in landscape and weather conditions, and an itinerary. Guests are responsible for providing their own sleeping bags, toiletries and transportation to and from Temagami, while TATC supplies the tipi accommodations, food and other camp and activity tools and equipment.

"It's important for our guests to feel comfortable and safe in our community," says Virginia. TATC explains to guests that air ambulance services from Sudbury are available; the camp has liability and boating insurance; and the use of life preservers.

Upon arrival, guests attend an orientation session that describes the land, flora and fauna and how to travel safely within it. First Nations and community protocol is also explained on what to expect, the experience and its significance and photography. Understanding norms in other cultures helps TATC to explain the differences of Canadian and European practices. For example, Virginia explains that in Temagami swimsuits are essential.

Markets/Customers

TATC has attracted international guests from Britain, Germany, Poland, Scotland and Switzerland, however, 65 percent of her guests are Americans originating from the eastern states, for example, Pennsylvania and New Hampshire, as well as western American cities of Los Angeles and San Francisco. Virginia estimates that 10 percent of her guests are residents of Toronto and Ontario, while 85 percent are 35-65 years old and 12 percent are 17-34 years and the balance under the age of 17. The corporate and professional market has discovered TATC - one of the celebrities from the *Today Show* is a regular guest.

Virginia's observed an increase in the number of independent women travellers seeking a soft outdoor adventure experience. One of her camp packages is tailored to meet this group's needs encouraging independent travellers to build friendships with other campers.

The business plan was a good tool for defining whom the camp would appeal to, but when the business started, the market profile didn't fully reflect what was written in the plan. Virginia said, "We thought the camp would appeal to the Aboriginal community, but we learned they prefer the 'wonderland' of the big city. We've only started to get First Nations groups".

TATC has targeted its camp for small groups, attracting couples, families and individuals, staying away from bus or tour groups. "It's too difficult for buses to get to our site," Virginia said. Workshop facilitators have also been bringing groups for team building and training to the camp.

A bulletin board on site displays cards, letters and photos of past campers remarking on their memorable experience. Roughly three years after TATC began, it started to see guests return. Virginia said, "One of our guests is returning to have their family reunion at our camp." Five years into the business, an estimated 35 percent of guests are repeat visitors.

Marketing

Marketing activities are chosen carefully to target the right customers, and not too many. TATC is a small business and too much promotion could result in too much demand and be too costly, eating a large part of its operating budget. Virginia locates funding and cooperative programs for marketing activities to get the most out of her marketing dollars. Her brochures are sent directly to guests once they've booked, are on brochure racks in the area, and mailed to select tour operators and associations. The website listed and linked to other websites providing TATC with a promotional tool available 24 hours a day, 365 days of the year, world-wide.

"We virtually stopped spending money on advertising — we only advertise in regional tourism publications like Ontario Tourism Magazine and the NONTA travel guide," says Virginia. TATC realized the value of maintaining contact with past guests and has focused its efforts on relationship marketing. "We keep in contact with our past guests by email. They often send emails after they've returned home telling us how they enjoyed their time at our camps." Virginia makes sure she acknowledges these emails.

Making connections with others in the tourism industry has enabled Virginia to gain greater insight into the industry, which isn't always available through local contacts. TATC offers travel trade commission at 20 percent. Virginia also serves as a board member to NONTA and the Aboriginal Tourism Team Canada. She has been able to provide these organizations with information on the state of tourism in her area, the needs of small tourism operators, as well as ecotourism. In return, she's gained perspectives on emerging market opportunities, connections with the national tourism industry, and knowledge of other Aboriginal tourism products.

Participating in fam tours for media and the travel trade has helped by improving the awareness of Temagami and what it has to offer. The results of marketing activities are not always in the near future, often in the tourism industry they occur a year or two later. Virginia said, "We hosted a group of German travel agents, but we don't expect to start to see any results for about a year."

To keep her connections alive with the tourism industry, Virginia attends trade shows such as Rendevous Canada, and welcomes invitations to speak at conferences, workshops and seminars, as well as other promotional opportunities. Temagami Anishnabai Tipi Camps is one of the products in a FEDNOR and ATASO (Aboriginal Tourism Association of Southern Ontario) film promoting the region.

Operations

Getting and having the right tools in place and not 'overdoing it' are key to TATC's success. Liability and boat insurance are essential, for both legal reasons and the comfort and peace of mind of guests. After a few years operating, TATC realized it would benefit from adding another boat. The boat not only transports guests to the camp, but it also evolved into a new business, a water taxi service filling a community need.
Operating a camp isn't an easy venture. Although Virginia had good practical business experience and skills, as well as community and cultural knowledge, she says, "I wish I knew more about operating camps day-to-day and about marketing and how to market this business."

Payment

TATC is capable of confirming reservations two years in advance, provided a deposit is paid. Cash, money orders and certified cheque are the only accepted forms of payment. "We're a small operation, and I need to keep the administrative activities to a minimal. Taking credit card payments means there is more paperwork to do."

Staff Training

All staff are oriented on camp operations receiving clear direction on basic operations, the set of principles based on good business management and Anishnabai values and the importance of a good attitude. Virginia said, "We make it our policy not to compromise any of our principles, yet remember that the customer comes first." Staff are also involved in planning and coordination of camps.

Membership and Partnership

Membership has proven to be valuable to TATC. It has membership with the Northern Ontario Native Tourism Association (NONTA), which promotes the camp and its other members at trade shows NONTA attends, as well as publishes an annual travel guide featuring its members. Membership with the Temagami Chamber of Commerce ensures TATC is connected and involved with directing the future of tourism in the region. TATC is also able to participate in Chamber marketing initiatives including website listings and links, and utilize networking opportunities. Connections have also been built directly with group coordinators in London, Ontario and the United States.

Community Benefits

The camp has been an asset to the Temagami First Nation community. The Band uses the camp in the spring and fall for ceremonies and children day care, as well as other group and cultural activities. Community businesses have gained business from visitors and TATC purchases of goods and services. In addition, more exposure of Temagami has meant that more business opportunities exist for the Band and its members.

Appendix 3

Notes on Working With The Travel Trade

Notes On Working with the Travel Trade

In order to effectively work with the travel industry it is important to recognize the various distribution channels and means to take products to market. Each distribution channel has different requirements related to pricing, packaging and marketing and has varying levels of importance to the Canadian supplier, depending on the markets they are in.

Without the travel industry as part of the transaction, the Supplier has a direct-to-Consumer relationship. Traditionally, the Supplier, through marketing activities such as brochures, distribution, website, advertising, sales calls and past client referrals, develops this relationship. In this capacity, they also control the booking and payment processes.

This can be the most costly relationship to the Supplier, however it allows the Supplier to control all aspects of the promotion and selling of their product and to communicate directly with the Consumer. This type of relationship may work effectively in markets that are aware of the destination or where the Consumer is willing to coordinate their own travel plans. The Canadian and U.S. short-haul markets are potentially the best markets for a Supplier-to-Consumer relationship. They feel comfortable travelling in their own region, and are generally more familiar with the geography of the country than long-haul visitors. They generally travel in their own car and book their own accommodation.

However, when the goal is to establish a strong base of business from the U.S. long-haul markets and overseas markets, the travel trade distribution channel becomes very important. These vacations tend to be longer, incorporate a variety of components including transportation, accommodation, activities and meals. This travel is also done either independently or as a preformed group.

There will still be international travellers who will book some elements of their vacation directly but generally a Consumer will involve a travel trade partner when the booking incorporates Suppliers or services that are not mass market, as they are harder for the Consumer to find, book and incorporate into their longer vacation. Additionally, the Consumer in Europe is well aware of the benefits of booking through a Travel Agent or a Tour Operator as in Europe there are strong Consumer Travel Laws protecting the Consumer should their vacation not go as planned. However, to receive compensation they must book their vacation through a European travel trade partner as they are legally bound to provide restitution.

Understanding the Travel Industry Distribution Channels

The travel industry comprises of several types of relationships (distribution channels), which ultimately bring the Supplier's product to market:

1. Supplier →Travel Agent → Consumer
2. Supplier →Tour Operator → Consumer
3. Supplier →Tour Operator → Travel Agent →Consumer
4. Supplier → Receptive Tour Operator → Tour Operator → Consumer
5. Supplier → Receptive Tour Operator → Tour Operator → Travel Agent → Consumer.

In the Canadian and U.S. long-haul markets the first three booking relationships (1,2, 3) are the most common. In the overseas markets the latter two (4 & 5) are the most common, but some larger Tour Operators also work directly with the Suppliers in Canada (2 & 3). The use of these distribution channels affects product development, pricing, marketing materials, the selling and booking process and the timelines when these activities occur.

Receptive Tour Operators

A Receptive Tour Operator contracts the Suppliers in their region of operation, sells these as individual components or combines Suppliers into packages and promotes these offerings to Tour Operators or in some cases Travel Agents. Most Receptive Tour Operators work exclusively with Tour Operators and Travel Agents and do not promote their own brand through a retail brochure. The Receptive Tour Operator acts as a ‘broker’ between the Suppliers and the Tour Operator and in most cases, the Consumer does not know that there is another party involved in the booking, other than the Tour Operator they booked with. Most Receptive Tour Operators will negotiate net rates that represent between 20—30% off of the retail price of the Supplier. They will then add in the appropriate taxes and a profit margin of between 10 – 15% (depending on the complexity of the package). This new price is the one published in their net tariff using the term Net Wholesale Price. They sell the packages and services to their Tour Operator clients through a Net Tariff.

Tour Operators

A Tour Operator either contracts net prices directly with Suppliers (generally 20% off the retail price) or buys through a Receptive Tour Operator, or both. They then take these Net Price offerings as is or combine multiple components into a package, add on their mark-up (generally 10% - 20%), plus if they sell to Travel Agents or other Tour Operators they will build in another 10 – 20% for commissions). The more specialized a Tour Operator is with a destination, the more likely they may be to contract some specialty products or services directly. Specialized Tour Operators tend to be smaller, have Consumer-direct relationships and are willing to promote themed experiences. The larger Tour Operators tend to focus on mainstream products, have expansive partnerships with retail agency chains and have less interest in developing niche products. Some Tour Operators produce their own group departures, others sell FIT and buy into another Tour Operator’s (or Receptive Tour Operator’s) group tours. All Tour Operators develop their marketing materials, which may include brochures, tariffs, flyers, website, and advertising, and undertake sales activities. The expense of producing their sales and marketing activities is generally at the expense of the Tour Operator and is paid for through the markup on their packages.

Travel Agents

Travel Agents may book directly with a Supplier, especially if the Supplier’s products are featured on the airline reservations systems such as Sabre, Worldspan, Amadeus, etc. They will also go online to Suppliers’ websites and travel sites to find packages and services and may book online on behalf of their clients. If they book directly, they are expecting a minimum 10% commission on FIT bookings. Some travel agencies also sell groups tours, some which they develop themselves and others which they purchase from Tour Operators. This distribution channel generally uses Tour Operator brochures to sell from. For bookings through a Tour Operator, they may receive 10 –15% commission, depending on their relationship with the Tour Operator and the volume of business they produce for this Tour Operator. There is an emerging trend in agencies having ‘Specialist Agents’ that have a recognized and proven experience in selling a specific destination or experience. Additionally, some agencies are specialists in specific travel, i.e. cruising, safaris, or specific destinations.

Consumers

A Consumer may book directly with the Supplier via email, online, phone or fax. They may also book directly with some Tour Operators by the same means. They will also do a lot of research online to find out about destinations and vacation possibilities. However, many long-haul Consumers do go to a Travel Agent to book their travel. They also may seek out a specialist Travel Agent or agency. When a Consumer makes a booking through a Travel Agent, who is purchasing the package through a Tour Operator, who has purchased through a Receptive Tour Operator, the end Supplier’s product may ultimately be sold for approximately 20% over the retail selling price of the Supplier. However, the price is generally converted into the local pricing for the country it is sold in and if packaged as a part of a multi-component tour, an individual Supplier’s pricing is never exposed.

Booking Process

In the past two years, real-time bookings, where Tour Operators can receive immediate confirmation have become a much-demanded service in markets such as the U.K., Europe, Australia and New Zealand. Real-time bookings allow the Tour Operator to close the sale when the client wants to buy, rather than having to delay a confirmation by a few days. These bookings tend to be online, through either a Supplier, Tour Operator or Receptive Tour Operator’s own on-line booking website.

Without real-time bookings the international market generally has to email or fax their bookings to Canada and will generally have a 24 – 72 hour lag time between the Consumer making the booking and the confirmation back to the Consumer from the tour operator or travel agent. In today’s world of technology, this delay is becoming less acceptable by both the travel trade and the Consumer. Thus, any entry into the international market is made more successful when real-time bookings are available.

In the U.S. market, the online booking requirement, though a benefit, is not as necessary for tour operators and travel agents due to the fact that they can call the supplier or tour operator via a toll-free phone line or via fax or email. Since the time zones are the same, most bookings can be confirmed within the same day they are received.

Developing Relationships with Tour Operators

In order to develop relationships with Tour Operators, it is generally necessary for Suppliers to personally meet with them through participation in trade shows, marketplaces and conferences and then through follow-up meetings in their office. The process of developing key accounts in each market is generally a long process, therefore the normal amount of time that it will take to develop a presence in a market is at least 3 years, as long as a consistent presence is maintained. The time and expense to develop this market can be reduced dramatically if a Supplier works with a Receptive Tour Operator or Tour Operator that has existing contacts in the market and understands how to work in the market. As Receptive Tour Operators are located within Canada, it is easier to develop a relationship with these companies, however there are currently only a handful which have strong enough relationships in the international marketplace to effectively represent a Supplier's products to a wide audience. As well, many are primarily servicing mainstream travel and it is difficult for them to make a concerted effort to promote Aboriginal tourism, though this product can certainly be included as part of their overall product offerings.

Sales Materials Used by the Travel Trade

Tariffs

Traditionally, most Receptive Tour Operators present their product in the form of an FIT Confidential Wholesale Tariff Manual. This manual contains a variety of prepackaged programs as well as individual services such as accommodation, transportation and activities, which allow the Tour Operator to sell individual components or create their own packages. From this tariff, Tour Operators select products that suit their specific market and which they will showcase in their brochures or on their website. The Receptive Tour Operator then provides images of products and destinations to support the production of the Tour Operators' brochures. These manuals are produced in the spring/summer for the following spring/summer/fall and are generally available for distribution by July/August of the year preceding the bookings. The tariff is generally priced in net Canadian dollars.

Brochures

Tour Operators generally promote their offerings through brochures. These brochures generally feature descriptions, images, retail prices and booking information. Some Tour Operators provide these brochures directly to the Consumer and others distribute these to travel agencies in their market region. These brochures are generally distributed in the fall and winter for summer bookings. Brochures featuring winter experiences are generally distributed in the late summer and fall. The brochures are priced in their local currency.

Websites

Websites are becoming a mandatory part of the marketing material requirements. Many Receptive Tour Operators have a password-protected website, which displays their Net Tariff, as well as providing real-time bookings. Passwords are issued to their Tour Operator clients to allow them the ability to access the site as well as book online. The Tour Operators generally have a billing account set up with the Receptive Tour Operator or pay via credit card. Tour Operators have their own website to promote their packages and either refer the viewer to a Travel Agent, or if they accept Consumer-direct bookings, they will also provide their booking contact information to the Consumer. Some Tour Operators allow online bookings from Travel Agents who use their IATA number as their password, and some also allow online bookings by the Consumer.

Contracting & Booking Timelines

A Receptive Tour Operator generally starts contracting their travel services 15 months in advance so that they can have their information ready in time to distribute to the Tour Operators. The Tour Operators contract their services 8 – 12 months in advance. The UK is generally the first market to produce their brochures, and are usually pursuing rates and information by midsummer for the following summer and in late fall/early winter for the following winter. Most other markets require information a little later, generally by September, however the French market is in the late fall and the Asian market is as late as

March for the upcoming summer. The average reservation cycle from overseas markets tend to be 3-8 months prior to travel, with the U.S. and Asian markets booking within 60 days, and with the trend to last-minute bookings, travel within 30 days from all markets is on the increase.

Appendix 4

List of Persons Interviewed

List of Persons Interviewed

Study Component	Organization	Contact	Telephone
M	Canadian Heritage	Jean-Yves Cayen	(819) 997-6307
M	Canadian Tourism Commission	Murray Jackson	(613) 954-3953
M	Parks Canada	Bob Weaver	(403) 292-4740
M	Indian and Northern Affairs Canada	Jerry Ghazal	(613) 995-8741
M	Indian and Northern Affairs Canada	Camille Choquette	(613) 995-8741
CRIS	Aboriginal Business Canada – Alberta/NWT	Barry Irwin	(780) 495-4114
CRIS	Aboriginal Business Canada – British Columbia	Meesan Lee	(604) 666-3873
CRIS	Aboriginal Business Canada – Maritimes	Bill McIntyre	(902) 426-5038
CRIS	Aboriginal Business Canada – Northern Ontario	Wally Bannon	(807) 623-5397
CRIS	Aboriginal Business Canada – Quebec/Nunavut	Marc Boucher	(514) 283-1843
CRIS	Aboriginal Business Canada – Saskatchewan	Bob Cannon	(306) 975-5334
CRIS	Aboriginal Business Canada – Southern Ontario	Chris Hamden	(416) 973-0282
CRIS	Aboriginal Business Canada – Yukon	Doug Carnegie	(867) 668-6925
CRIS	Central Labrador Economic Development Board	Leander Baikie	(709) 896-8506
CRIS	Eskasoni Development Corporation (Nova Scotia)	Joel Denny	(902) 379-2544
CRIS	Federation of Saskatchewan Indian Nations	Pat Woods	(306) 955-4712
CRIS	Indian and Northern Affairs Canada – (B.C.)	Bill Guerin	(604) 665-5091
CRIS	Indian and Northern Affairs Canada – Nunavut	Michael Bloor	(867) 975-4544
CRIS	Indian and Northern Affairs Canada – Ontario	Ron Mavin	(416) 952-9582
CRIS	Indian and Northern Affairs Canada – Sask	Dwayne Seib	(306) 780-8868
CRIS	Joint Economic Development Commission (New Brunswick)	Alex Dedam	(506) 776-1200
CRIS	Manitoba Métis Federation Inc.	Al Benoit	(204) 586-8474
CRIS	Moose Cree First Nation Economic Development (Ontario)	Bert Wapachee	(705) 658-4619
CRIS	Peigan Nation Economic Development (Alberta)	Velma Daychief	(403) 965-3940 ext. 228
CRIS	Tobique First Nation Economic Development (New Brunswick)	Wayne Nicholas	(506) 273-5590
CS	Huit Huit Tours (Nunavut)	Kristiina Alariaq	(867) 897-8806
CS	Société touristique des Autochtones du Québec	Guylaine Gill	(418) 843-5030
CS	St. Eugene Mission Resort Development (BC)	Chief Sophie Pierre	(250) 489-2464
CS	St. Eugene Mission Resort Development (BC)	Elder Ponte	(250) 489-2372

Study Component	Organization	Contact	Telephone
CS	Temagami Anishnabai Tipi Camp (Ontario)	Virginia McKenzie	(705) 237-8876
KI	Aboriginal Tourism Team Canada	Virginia Doucette, Executive Director	(613) 235-2067
KI	(former) Canadian Aboriginal Tourism Association	Barry Parker	(613) 722-1255
KI	Canadian Tourism Commission	Murray Jackson	(613) 954-3953
KI	Canadian Tourism Commission (Germany)	Karl-Heinz Limberg	49-211-172-17-20
KI	Canadian Tourism Commission	Frank Verschuran	(613) 954-3947
KI	Parks Canada, Atlantic Service Centre	Rob Thompson	(902) 426-3445
KI	Parks Canada, External Relations	Daphne Mainprize	(819) 953-7256
KI	Parks Canada, Gwaii Haanas National Park Field Unit	Ernie Gladstone	(250) 559-6300
KI	Parks Canada, Ontario Service Centre	Sheryl Smith	(705) 750-4936
KI	Parks Canada, Director General's Office, Western & Northern Canada	John Allard	(403) 292-8868
KI	Parks Canada, Western Service Centre	Ray Delbaere	(204) 983-1607
RATA	Aboriginal Tourism Association of BC	Wally Samuel, Director	(250) 723-4393
RATA	Aboriginal Tourism Association of Southern Ontario	Jan Porter	(519) 751-1127
RATA	Manitoba Aboriginal Tourism Association	Curtis Jonnie	(204) 925-2029
RATA	Niitsitapi Tourism (Alberta)	Lori Beaver	(403) 212-2685
RATA	Northern Ontario Native Tourism Association	Bill Rogoza	(807) 623-0497
RATA	Northwest Territories Tourism	Colleen Bruce	(867) 873-5007
RATA	Nunavut Tourism	Maureen Bundgaard	(867) 979-6551
RATA	Saskatchewan Aboriginal Tourism Association (developing organization – name may change)	Darryl McCallum	(306) 787-2313
RATA	Société touristique des Autochtones du Québec	Guylaine Gill	(418) 843-5030
RATA	Yukon First Nations Tourism Association	Debbie Parent	(867) 667-7698
TC	Canusa Touristick GmbH, Germany	Tilo Krause-Dunow, President	49-40-22-72-530
TC	Creative Western Adventures, Canada	Susanne Eugster, President	403-571-2380
TC	DER Tours, Germany	Per Illian, Director of Product, NA	49-69-95-88-3205
TC	Great Excursions Co., Canada	Claude-Jean Harel, CEO	306-569-1571/ 780-3901
TC	Hotelplan, Switzerland	Marcel Bischof, Product Manager	411-277-8757
TC	Jonview Canada, Canada	Gabby Kotz, Product Manager	416-323-9090
TC	JTB International, Canada	Mimi Horita, Manager, Marketing	604-214-6285
TC	Moccasin Trails, Canada	Bill Rogoza, General Manager	807-623-0497
TC	Pioneer-Erlebnisreisen GmbH, Germany	Edmund Belser, Owner/Manager	49-7471-6962

Study Component	Organization	Contact	Telephone
TC	Saga Holidays, USA	Tara Kuglen, Director of Product	617-262- 2262 ext 2311
TC	Sky Tours, Switzerland	Thomas Jenzer, Product Manager	411-295-5895
TC	Tailor Made Travel, UK	James Butler, Product Manager	44-1386-712-017
TC	Thomas Cooke, UK	Jill Troth, Product Manager	44-73-341-7000
TC	Tours Innu, Canada	Jean-Michel Perron, General Manager	418-843-5151

Methodology = M
CRIS = Capacity and Readiness Indicators Survey
CS = Case Studies
KI = Key Informant Input
RATA = Regional Aboriginal Tourism Association Input
TC = Tour Company Input